



## The City Bridge Trust Committee

**Date:** THURSDAY, 18 APRIL 2013  
**Time:** 1.45 pm  
**Venue:** COMMITTEE ROOMS, WEST WING, GUILDHALL

**Members:** Deputy Billy Dove (Chairman)  
Deputy Wendy Mead (Deputy Chairman)  
Deputy Ken Ayers (Chief Commoner)  
Ray Catt  
Alderman Alison Gowman  
Deputy Revd Stephen Haines  
Alderman Peter Hewitt  
Vivienne Littlechild  
Deputy Edward Lord  
Jeremy Mayhew  
Deputy Joyce Nash  
Ian Seaton  
The Rt Hon the Lord Mayor Alderman Roger Gifford (Ex-Officio Member)

**Enquiries:** Claire Sherer  
tel. no.: 020 7332 1971  
[claire.sherer@cityoflondon.gov.uk](mailto:claire.sherer@cityoflondon.gov.uk)

Lunch will be served for Members in the Guildhall Club at 1pm

**John Barradell**  
Town Clerk and Chief Executive

# AGENDA

## Part 1 - Public Agenda

1. **APOLOGIES**
2. **MEMBERS' DECLARATIONS UNDER THE CODE OF CONDUCT IN RESPECT OF ITEMS ON THE AGENDA**
3. **MINUTES**  
To agree the public minutes and non-public summary of the meeting held on 13 February 2013.  

**For Decision**  
(Pages 1 - 10)
4. **OUTSTANDING ITEMS**  
Report of the Town Clerk.  

**For Information**  
(Pages 11 - 14)
5. **PROGRESS REPORT AND EVENTS**  
To receive a progress report of the Chief Grants Officer.  

**For Information**  
(Pages 15 - 28)
6. **GET LONDON WORKING - THE YOUTH OFFER**  
To receive an update report of the Chief Grants Officer.  

**For Decision**  
(Circulated separately)
7. **GRANT APPLICATIONS**  
To consider the Chief Grants Officer's reports on grant recommendations as follows:-
  - a) **Grant Recommendations - Introductory paper** (Pages 29 - 36)

b) **Grant Recommendations and Assessments** (Pages 37 - 212)

<b><u>Annex</u></b>	<b><u>Organisation</u></b>	<b><u>Recommended Grant</u></b>	<b><u>Page</u></b>
1	Markfield Project	£99,000	39
2	Misgav	£56,500	50
3	Merton Home Tutoring Service	£34,120	60
4	British Muslims for Secular Democracy	£45,000	71
5	Latin American Women's Aid	£96,500	81
6	St Cuthbert's Centre	£46,500	91
7	Federation of London Youth Clubs (London Youth)	£55,000	101
8	Age UK Enfield	£97,500	112
9	Hestia Housing Support	£50,000	123
10	Kingston Centre For Independent Living	£133,000	133
11	Muscular Dystrophy Campaign	£42,500	143
12	Stroke Association	£80,850	154
13	CREATE London	£75,000	165
14	Pilotlight	£51,000	176
15	Heart of the City	£108,000	187
16	Forum for Health and Wellbeing	£58,900	198
17	City Bridge Trust - Access and Sustainability Advisory Service	£192,900	208

c) **Grants Recommended for Rejection** (Pages 213 - 222)

8. **TO CONSIDER REPORTS OF THE CHIEF GRANTS OFFICER AS FOLLOWS:-**

- a) Withdrawn and Lapsed Applications (Pages 223 - 226)
- b) Variations to Grants (Pages 227 - 230)

- c) Grants Approved under Delegated Authority (Pages 231 - 232)
- d) Reports on Monitoring Visits (Pages 233 - 236)

9. **EXPANSION OF CITY CAREERS OPEN HOUSE PROGRAMME**

Joint report of the Chief Grants Officer and Director of Economic Development.

**For Decision**  
(Pages 237 - 242)

10. **CITY BRIDGE TRUST BUSINESS PLAN 2013-16**

Report of the Chief Grants Officer.

**For Decision**  
(Pages 243 - 244)

11. **QUESTIONS ON MATTERS RELATING TO THE WORK OF THE COMMITTEE**

12. **ANY OTHER BUSINESS THAT THE CHAIRMAN CONSIDERS TO BE URGENT**

13. **EXCLUSION OF THE PUBLIC**

MOTION – That under Section 100A(4) of the Local Government Act 1972, the public be excluded from the meeting for the following items of business on the grounds that they involve the likely disclosure of exempt information as defined in Part I of Schedule 12A of the Local Government Act.

**Part 2 - Non-Public Agenda**

14. **NON-PUBLIC MINUTES**

To agree the non-public minutes of the meeting held on 13 February 2013.

**For Decision**  
(Pages 245 - 246)

15. **QUINQUENNIAL REVIEW - CONSULTATION FINDINGS**

Report of the Chief Grants Officer.

**For Information**  
(Pages 247 - 250)

16. **QUESTIONS ON MATTERS RELATING TO THE WORK OF THE COMMITTEE**

17. **ANY OTHER BUSINESS THAT THE CHAIRMAN CONSIDERS URGENT AND WHICH THE COMMITTEE AGREE SHOULD BE CONSIDERED WHILST THE PUBLIC ARE EXCLUDED**

# Agenda Item 3

## THE CITY BRIDGE TRUST COMMITTEE

Wednesday, 13 February 2013

Minutes of the meeting of the The City Bridge Trust Committee held at Guildhall, EC2 on Wednesday, 13 February 2013 at 11.30am

### Present

#### Members:

Deputy Billy Dove (Chairman)  
Ray Catt  
Deputy Revd Stephen Haines  
Alderman Peter Hewitt  
Vivienne Littlechild  
Deputy Edward Lord  
Jeremy Mayhew  
Deputy Joyce Nash

#### In attendance:

Deputy Catherine McGuinness

#### Officers:

Gregory Moore	- Town Clerk's Department
Steven Reynolds	- Chamberlain's Department
Jenna Rigley	- Chamberlain's Department
Clare Thomas	- Chief Grants Officer, The City Bridge Trust
Sandra Davidson	- The City Bridge Trust
Jenny Field	- The City Bridge Trust
Stewart Goshawk	- The City Bridge Trust
Jemma Grieve Combes	- The City Bridge Trust
John Merivale	- The City Bridge Trust
Joan Millbank	- The City Bridge Trust
Ciaran Rafferty	- The City Bridge Trust
Tim Wilson	- The City Bridge Trust
Susanna Lascelles	- Public Relations Office
Lauren Scally	- Contact Centre

#### Also Present:

Representatives from the following organisations, whom the Chairman welcomed to the meeting, were also present:

- Lord's Taverners (Item 6.1, Annex 3)
- Barbican Centre Trust Ltd (Item 6.1, Annex 4)

## Part 1 - Public Agenda

### 1. APOLOGIES

Apologies for absence were received from Deputy Wendy Mead, Alderman Alison Gowman, Michael Henderson-Begg and Ian Seaton.

The Chairman took the opportunity to pay tribute to John Bird, who had resigned from the Court of Common Council since the last meeting of the Committee. Mr Bird had served on the Committee since its establishment and was indeed its first Chairman, and as such it was felt it would be appropriate for the Chairman and Chief Grants Officer to write to Mr Bird thanking him for his contribution over the years.

It was also noted that this would be Stewart Goshawk's last meeting, as he would shortly be resigning from his contract for general grant-making work with the City Bridge Trust. Whilst he would still be working within the Trust's office three days per week managing the Wembley National Stadium Trust, this would be his last attendance at this meeting and so the Chairman took the opportunity to thank him for all his work in his eighteen years at the Corporation, including sixteen working for the Trust.

### 2. MEMBERS' DECLARATIONS UNDER THE CODE OF CONDUCT IN RESPECT OF ITEMS ON THIS AGENDA

Jeremy Mayhew declared a personal non-prejudicial interest in respect of the application from the Barbican Centre Trust Ltd as a Member of the Barbican Centre Board.

### 3. MINUTES

The public minutes and summary of the meeting held on 10 January 2013 were approved.

### MATTERS ARISING:

- **1.) Retirement of Chief Grants Officer (p2)** – The Chairman expressed concern that he had not been involved as much as he would have liked in the recruitment of the current Chief Grants Officer's successor. A Member suggested that the matter be raised with the Town Clerk and Comptroller & City Solicitor outside the meeting to explore the potential for any change to the appointments process and the legalities surrounding this.

### 4. OUTSTANDING ITEMS

The Committee received a report of the Town Clerk identifying those items raised at meetings of the Committee that required further action by officers.

With reference to the application from the Shakespeare Globe Trust, officers were asked to try and elicit a revised application one final time, copying in the organisation's Chief Executive to any correspondence.

**RESOLVED:** That the contents of the report be noted.

## 5. **PROGRESS REPORT AND EVENTS**

The Committee received the regular progress report of the Chief Grants Officer which highlighted the various activities that were on-going or had recently concluded.

The Chairman drew Members' attention to the confirmation of a date for the annual Committee Dinner, which would be held on Friday 21st June at Tower Bridge, and also took the opportunity to inform Members that the Trust's Growing Localities Awards ceremony would take place on Thursday 11th April, in the Garden Room at the Barbican Centre. Formal invitations for both events would of course be circulated in due course.

A Member highlighted access issues at Tower Bridge for those arriving in taxis, asking that explicit directions be provided with the invitations to ensure that guests were fully aware of how to reach the venue as easily as possible.

**RESOLVED:** That the contents of the report be noted.

## 6. **GRANT APPLICATIONS**

The Committee considered the Grant Applications as follows:

### **6.1 Introductory Paper**

The Committee considered a report of the Chief Grants Officer, introducing the grants programmes and stating that a total of fifty-one applications would be dealt with at the meeting, of which one was a strategic initiative, seventeen were recommended for grants and nineteen recommended for rejection, with nine having been withdrawn. Five grants were also noted as having been approved under delegated authority.

A request to carry forward funds remaining in the 2012/13 Working with Londoners and Growing Localities to the 2013/14 grants budget was also approved, with the Chamberlain advising that the request would go to the Resource Allocation Sub-Committee for formal approval.

**RESOLVED:** That:-

- The contents of the report be noted;
- Officers be instructed to put formal arrangements in place to carry forward the £2,596,473 remaining from the 2012/13 Working with Londoners grants budget to financial year 2013/14; and
- Officers be instructed to put formal arrangements in place to carry forward the £233,410 remaining from the 2012/13 Growing Localities grants budget to the 2013/14 general grants budget.

### **6.2 Grant Recommendations and Assessments**

The Committee considered a report of the Chief Grants Officer recommending grants to organisations.

During consideration of the applications before the Committee, the following comments were made by Members of the Committee and relevant officers:

- The Chairman reminded Members of the distinction between the Barbican Centre and the Barbican Centre Trust Ltd at Annex 4 (Barbican Centre Trust Ltd), and made clear that the funding was for a third and final year of a grant. The Chief Grants Officer noted that it would be sensible to further clarify the definition of “exceptional grants” as part of the quinquennial review to avoid any potential confusion in future.
- In response to a Member’s comment at Annex 8 (London Orchard Project Ltd) concerning the Lord Mayor’s interest in this area, the Chief Grants Officer undertook to explore the possibility of a cheque presentation ceremony being arranged to take place at the Mansion House.
- With regard to the application at Annex 15 (Green Alliance), a Member noted that this was the second successive year that funding had been sought and asked officers to ensure the applicant did not become dependent on the Trust’s funding. Officers undertook to pass on the message but gave assurances that there was no danger of the organisation becoming reliant on funding from the Trust given the wide range of funders already involved and their knowledge that Trust funding was limited to a maximum of three years.
- Members were supportive of the Strategic Initiative proposed at Annex 18 (Institute for Public Policy Research), citing their concerns over the issue of payday loans and some of the seemingly extortionate interest rates charged to some of society’s most vulnerable people. The Chief Grants Officer advised that this research would mesh well with other campaigns being undertaken in the field as the IPPR were very well connected in this area.
- It was noted that the IPPR had been identified as the preferred think-tank for this research given their emphasis on solutions, which had been apparent in the work they had previously done for the Trust concerning elderly people, which had provided a number of concrete recommendations. A Member commented that the Policy & Resources Committee were keen to be able to maintain an holistic overview of all those think-tanks funded by the Corporation to ensure effective monitoring, and asked that news of this funding be fed back to that Committee accordingly.

**RESOLVED:** That the following grants be approved:-

<b><u>Annex Number</u></b>	<b><u>Organisation (and Borough that Benefits)</u></b>	<b><u>Grant Approved</u></b>
<b>Category: Accessible London</b>		
1.	Zoological Society of London (London-wide)	£50,000 towards the capital costs of providing access facilities at <i>Tiger Territory</i> .



**Category: Bridging Communities**

2. Aston-Mansfield (Newham) £32,350 over two years (£16,450; £15,900) for a part-time (2dpw) Outreach Worker and running costs to engage minority organisations in Newham ESOL Exchange, improving access to ESOL and gathering evidence of need and provision to inform ongoing delivery.
3. Lord's Taverners (Lambeth, Croydon, Kensington & Chelsea) £54,250 over three years (£18,500; £18,000; £17,750) towards a girls' and young women's sports and leadership project in three London boroughs.

**Category: Exceptional**

4. Barbican Centre Trust Limited (Several East London Boroughs) £250,000 towards Creative Learning projects in East London, building on the work supported by The City Bridge Trust between 2011 and 2013, conditional on BCT raising the balance of funds from other sources.

**Category: Growing Localities – Growing and Greening**

5. The Centre for Environmental Initiatives (Croydon, Sutton, and Wandsworth) £49,100 over two years (£24,300; £24,800) towards the salary and project costs required to develop seven local community food growing gardens.
6. Core Arts (Hackney and Newham) £42,600 over two years (2 x £21,300) towards the salary and running costs of "Greening the Grey."
7. Groundwork Thames Valley (Hounslow and Hillingdon) £45,000 over two years (2 x £22,500) towards the salaries and project on-costs associated with establishing 12 community growing spaces in Hillingdon and Hounslow.
8. London Orchard Project Ltd (London-wide) £49,510 (£23,950; £25,560) towards the costs of a part-time project coordinator and project costs required to set up and run Growing Localities Orchard Workshops.
9. Myatt's Fields Park Project £50,000 over two years (£24,000; £26,000) for the salary of a part-time

- |     |  |   |
|-----|--|---|
|     | (Lambeth and Southwark)                | (21hpw) Community Gardner and towards running costs to develop and sustain local food growing projects in north Lambeth and Southwark, subject to the Trust not being the largest single funder in Year 2, and receipt of independently examined and satisfactory financial statements for the year ended 31 July 2012. |
| 10. | Spitalfields City Farm (Tower Hamlets) | £50,000 over two years (2 x £25,000) for the salaries of two part-time Community Gardeners and project costs to support local community organisations in gardening and food growing skills.   |

**Category: Improving Londoners' Mental Health**

- |     |   |  |
|-----|---|--|
| 11. | Catholic Children's Society (Westminster) (Haringey, Barnet, Enfield and Brent) | £105,000 over three years (£45,000; £35,000; £25,000) towards the costs of a full-time Systemic Family Psychotherapist at the Bishop Harvey Family Service on the condition that the charity raises the balance of funding from other sources. |
| 12. | Hackney Bereavement Service (Hackney)   | £45,000 over three years (3 x £15,000) to meet the salary and associated project costs to expand and develop work with older people aged 80+.  |
| 13. | Maytree Respite Centre Ltd (London-wide)  | £120,000 over three years (3 x £40,000) towards the respite centre's outreach and support for suicidal people in despair.  |

**Category: London's Environment**

- |     |  |   |
|-----|--|---|
| 14. | EcoActive Education Services (Several London boroughs) | £84,000 over three years (£27,440; £28,000; £28,560) towards the salary and on-costs of a Senior Education Officer to deliver a whole-school and community project to prevent food, energy and packaging waste in north London. |
| 15. | Green Alliance   | £55,100 for a second year's work  |

	(London-wide)	towards the salaries of the policy adviser and deputy director, and associated costs, to address green living in London's tower blocks, to develop practical support for Londoners, and to influence decision makers. The grant is conditional upon a satisfactory monitoring and evaluation report on the previous grant.
16.	Octopus Community Network (Islington)	£78,400 over two years (2 x £39,200) for the salary of two part-time (2dpw and 3dpw) Development Officers to deliver the <i>Wild Places</i> project subject to The City Bridge Trust not being the organisation's single largest funder and on additional project funding (at least £19,300pa) being secured.
17.	One20 (TimeBank) (London-wide)	£80,000 over two years (2 x £40,000) for a Project Coordinator (0.8 FTE) and Programme Manager (0.2 FTE) plus delivery costs for two further and final years of <i>Leaders Together</i> .
18.	Strategic Initiative: Payday Loans (Institute for Public Policy Research) (London-wide)	Up to £50,000 to engage the IPPR to undertake the London element of a study into pay day loans and the availability of affordable credit for people in financial need; the funds to be made available from monies already approved for work on the Quinquennial Review and the Sharing Learning and Knowledge strategy.

### 6.3 Grants Recommended for Rejection

The Committee considered a report of the Chief Grants Officer recommending nineteen grant applications in the Working with Londoners programme be rejected for the reasons identified in the schedule attached to the report.

**RESOLVED:** That the grant applications detailed in the schedule attached to the report be rejected.

## 7. REPORTS OF THE CHIEF GRANTS OFFICER

The Committee considered the reports of the Chief Grants Officer as follows:

### **7.1 Withdrawn and Lapsed Applications**

The Committee received a report of the Chief Grants Officer detailing nine applications that had been withdrawn.

**RESOLVED:** That the contents of the report be noted.

### **7.2 Variations to Grants**

The Committee received a report of the Chief Grants Officer advising Members of variations to four grants agreed by the Chief Grants Officer since the last meeting of the Committee.

**RESOLVED:** That the contents of the report be noted.

### **7.3 Grants Approved Under Delegated Authority**

The Committee received a report of the Chief Grants Officer advising Members of five grants, totalling £99,810, which had been approved under delegated authority since the last meeting of the Committee as follows:

- Kazzum - £19,300 for a third and final year towards Kazzum's Pathways project for young migrants and refugees on condition of receipt of a satisfactory monitoring report for year two of the current award.
- West & North West London Vietnamese Association - £24,850 over two years (£12,425; £12,425) towards the costs of the coordinator, tutor and project on-costs for the ESOL project.
- Federation of City Farms & Community Gardens - £11,900 for the provision of 10 training courses over two years (2 x £2,950) and the printing, distribution and launch of the London Map (£6,000).
- Forest Farm Peace Garden - £19,760 over two years (£9,800; £9,960) towards the Bridge Worker's salary (10.5 hours per week) and associated project costs.
- Community Cancer Centre - £24,000 over two years (2 x £12,000) towards the costs of providing information and support to cancer patients and their carers.

**RESOLVED:** That the contents of the report be noted.

### **7.4 Reports on Monitoring Visits**

The Committee received a report of the Chief Grants Officer relative to two visits that had been undertaken.

**RESOLVED:** That the contents of the report be noted.

## **8. SOCIAL INVESTMENT ADVISOR - REQUEST FOR EXTENSION OF ROLE**

The Committee considered a joint report of the Director of Economic Development and the Chief Grants Officer concerning the proposed extension of the Social Investment Consultant role to 31 March 2014.

**RESOLVED:** That the following be approved:-

- a contribution of up to £50,000 to fund 50% of a dedicated Social Investment role and associated costs, subject to the City Bridge Trust Committee agreeing to fund the balance and that the contribution be met from the Policy Initiatives Fund for 2013/14 and charged to City's Cash (categorised under the "Communities" heading);
- a variation of the consultancy contract to facilitate an extension to 31 March 2014; and,
- the City's Procurement Regulations relating to tender thresholds for the consultant be waived to facilitate the extension of the contract.

9. **GROWING LOCALITIES AWARDS UPDATE**

The Committee received a report of the Chief Grants Officer providing an update on the Growing Localities programme.

**RECEIVED.**

10. **QUESTIONS ON MATTERS RELATING TO THE WORK OF THE COMMITTEE**

There were no questions.

11. **ANY OTHER BUSINESS THAT THE CHAIRMAN CONSIDERS TO BE URGENT**

There were no urgent items.

12. **EXCLUSION OF THE PUBLIC**

**RESOLVED:** That under Section 100 A (4) of the Local Government Act 1972, the public be excluded from the meeting for the following items of business on the grounds that they involve the likely disclosure of exempt information as defined in Part I of Schedule 12A of the Local Government Act as follows:-

**Item Nos.**  
13 - 14

**Exempt Paragraphs**  
3

**Part 2 - Non-Public Agenda**

13. **MONITORING & EVALUATION REPORT (JULY 2008 - MARCH 2012)**

The Committee received a report of the Chief Grants Officer updating Members on the monitoring and evaluation of grants awarded under the "Working with Londoners" programmes which were launched in July 2008.

14. **QUINQUENNIAL REVIEW - PROGRESS REPORT**

The Committee received a report of the Chief Grants Officer updating Members on progress made with the quinquennial review and reporting on actions arising from the strategic workshop meeting of 16 November 2012.

**15. QUESTIONS ON MATTERS RELATING TO THE WORK OF THE COMMITTEE**

There was one question.

**16. ANY OTHER BUSINESS THAT THE CHAIRMAN CONSIDERS URGENT AND WHICH THE COMMITTEE AGREE SHOULD BE CONSIDERED WHILST THE PUBLIC ARE EXCLUDED**

There were two urgent items.

**The meeting ended at 12.20pm**

-----  
Chairman

**Contact Officer: Gregory Moore  
tel. no.: 020 7332 3113  
gregory.moore@cityoflondon.gov.uk**

# Agenda Item 4

<b>Committee:</b>	<b>Date:</b>
The City Bridge Trust	18 February 2013
<b>Subject:</b> Outstanding Actions	<b>Public</b>
<b>Report of:</b> Town Clerk	<b>For Information</b>
<b><u>Summary</u></b>	
<p>This report identifies those items raised at meetings of the City Bridge Trust Committee requiring further action by officers. The intention is to allow Members to track more easily progress made and record which outstanding actions have been dealt with.</p> <p>Those items which have arisen in the present financial year have been highlighted in the annex attached to the report.</p> <p>Members are asked to note the progress made to date.</p> <p><b>Recommendation:</b> Members are asked to note the contents of this report.</p>	

**Contact:**

Claire Sherer  
Committee & Member Services Officer  
claire.sherer@cityoflondon.gov.uk  
020 7332 1971

This page is intentionally left blank



The City Bridge Trust Committee – Outstanding Actions

Item	Action	Officer responsible	Progress to date
<b>5. Retirement of Chief Grants Officer</b>	Raise the Chairman's concerns that he had not been involved in the recruitment of the current Chief Grants Officer's successor with the Town Clerk and Comptroller & City Solicitor to explore the potential for any change to the appointments process and the legalities surrounding this.	Town Clerk / Chief Grants Officer	Information awaited.
<b>6. London Orchard Project Ltd</b>	Explore the possibility of a cheque presentation ceremony being arranged to take place at the Mansion House.	Chief Grants Officer	Information awaited.
<b>7. Strategic Initiative – Pay Day Loans and their Impact on poverty</b>	Advise the Directors of PRO and EDO of this initiative so that they can maintain a holistic overview of all those think-tanks funded by the Corporation.	Chief Grants Officer	Completed.
<b>Outstanding Grant Conditions: CBT Committee – 17/01/13</b>			
<b>Annex 1 – Cricket for Change</b>	Grant approved "subject to the receipt of satisfactory signed audited accounts for 2011/12".	Chief Grants Officer / Chamberlain	Information awaited.
<b>Annex 12 – Camden Carers</b>	Grant approved "subject to receipt of signed accounts for 2011/12".	Chief Grants Officer / Chamberlain	Information awaited.
<b>Annex 14 – Hackney Caribbean Elders</b>	Grant approved "subject to sight of a satisfactory organisational budget for the financial year 2013-14".	Chief Grants Officer / Chamberlain	Information awaited.
<b>Outstanding Grant Conditions (Item 6): CBT Committee – 13/02/2013</b>			
<b>Annex 9 Myatt's Fields Park Project</b>	Grant approved "subject to the Trust not being the largest single funder in Year 2, and receipt of independently examined and satisfactory financial statements for the year ended 31 July 2012."	Chief Grants Officer / Chamberlain	Information awaited.

This page is intentionally left blank

# Agenda Item 5

<b>Committee:</b>	<b>Date:</b>
The City Bridge Trust	18 April 2013
<b>Subject:</b> Progress Report	<b>Public</b>
<b>Report of:</b> Chief Grants Officer	<b>For Information</b>
<b><u>Summary</u></b>	
This is a regular Progress Report by the Chief Grants Officer.	
<b>Recommendation</b>	
That you receive this report and note its contents.	

## **Main Report**

### 1.0 **Work in Progress**

- 1.1 Your officers have worked hard to progress the 31 applications which have been received in response to "Get Young People Working – The Youth Offer". In today's papers you will be receiving 25 summaries of each application, with the remaining 6 to be brought to your meeting in May or June.
- 1.2 Officers have also been developing the draft of your new grants programmes and have completed the analysis of the online consultation. So as not to overburden Members with volumes of paperwork today, your officers will bring the draft programmes to your meeting in June. Today you will receive a paper "Quinquennial Review Consultation Findings", which summarises the main issues and findings for you to note.

### 2.0 **Awards Ceremonies**

#### 2.1 **Beacon Fellowship Awards 2013**

The Beacon Fellowship Awards 2013 were held at Mansion House on 6<sup>th</sup> February 2013, hosted by the Lord Mayor, who acknowledged City Bridge Trust's contribution in advancing philanthropy. You may recall that you are funding a new category of award, that of the Beacon Award for City Philanthropy as part of your *City Philanthropy – a wealth of opportunity* initiative. Winners in this category were ex-Man Group and former Goldman Sachs, Prudential and Heart of the City Chairman Harvey McGrath; entrepreneur John Stone who made his wealth in insurance; and a group of nine young professionals from a number of City firms who

together founded the Young Philanthropy Syndicate (Michael Harris, Adam Pike, Sam Cohen, Alex Dwek, Alex Gardner, Paul Gorrie, Niccolo Manzoni, Jack Prevezer and Conor Quinn). You are also funding Young Philanthropy as part of the *City Philanthropy* initiative.

## 2.2 **Sustainable City Awards**

The Sustainable City Awards were held at Mansion House on 19th March. The Trust continued its collaboration with the Worshipful Company of Pattenmakers, running the category of *Greening the Third Sector*. This rewards voluntary and community organisations that do not have the environment as their main focus but which have nevertheless made significant improvements in reducing their carbon footprint. Deputy Mead and Deputy Ayers represented the Trust on the judging panel, together with two of the Pattenmakers. This year's winner was Thrifty Couture, a social enterprise that trains ex-offenders to turn unwanted clothing into fashion garments at affordable prices.

2.3 You may be interested to learn that Scope, a disability charity, which you fund, won the Sustainable Finance Category for its Scope Bond Programme to grow its income generating activities in order to enable it to expand its services for disabled people.

## 2.4 **Growing Localities Awards**

Your officers are finalising the details for the launch of your latest edition of *The Knowledge - Learning from London*. This is entitled '*The Growing Localities Awards*'. This edition will showcase some of the work of applicants to the Growing Localities Awards scheme. You may recall that you are supporting the Awards scheme, as part of the Growing Localities initiative, in partnership with Lemos and Crane. A judging panel comprising the Chairman of City Bridge Trust, Martin Rodman of Open Spaces, the Chief Grants Officer and your officer Sandra Davidson selected the winners and runners-up as well as two Judges' special prizes in each of the five award categories from gardening and growing food to reclaiming and developing wasteland.

2.5 The purpose of the event on 11<sup>th</sup> April at the Barbican Centre is to recognise and celebrate the very best of 'greening and growing' initiatives from non-profit organisations large and small.

## 3.0 **ShareAction (formerly FairPensions) Annual Lecture**

3.1 In 2010, you approved a grant of £37,734 over three years, to ShareAction (formerly FairPensions), to part-fund the salary of a Director of Investor Engagement, to support the environmental education of shareholders and thereby improve London's global environmental impact.

3.2 ShareAction approached the Trust and the Remembrancer's Department, to see if the City of London Corporation would be willing to host its Annual Lecture. This took place at Guildhall, on 18<sup>th</sup> March. The former

US Vice-President, Al Gore, spoke on the theme "A Call to Action: Harnessing Capital Markets for a Sustainable World".

- 3.2 Al Gore began his talk by acknowledging the proven strengths of Capitalism as the best system yet devised for promoting human wellbeing. He then went on to elaborate, however, on where Capitalism currently falls short in practice – noting, for instance, that the original developer of GDP, Simon Kuznets, specifically warned against its use as a measure of welfare. For all its benefits, Capitalism fails to account for "externalities" such as pollution, the extreme adverse effects on the poor, or the urgent crisis of human-induced climate disruption – the scientific consensus on which is now "pretty much akin to the consensus around the law of gravity". The solution to these ills, Mr Gore maintained, lies in that other great system at our disposal, namely Democracy. A better informed Civil Society will be able to turn Capitalism to the advantage of ourselves and the natural systems on which we depend. He commended ShareAction for coming up with the tools to enable ordinary citizens to understand how their investments are managed, and for their pioneering work in shareholder engagement. The Lecture was very well received.
- 3.3 The Chairman and Chief Grants Officer later attended a private dinner hosted by the Lord Mayor Locum Tenens, Alderman David Howard, in the Chief Commoner's Parlour, where the conversation continued.

#### 4.0 **Media Work**

##### **City Philanthropy - a wealth of opportunity**

- 4.1 As stated in paragraph 3.1 of this report, the 8<sup>th</sup> Beacon Fellowship Awards were held at Mansion House on 6<sup>th</sup> February 2013, hosted by the Lord Mayor. As the principal sponsor of the awards, JP Morgan led on the press work announcing the winners. However, Champollion promoted the press release to trade and specialist press.
- 4.2 The Lord Mayor gave an interview on Radio 4's *Today* programme the next morning which has an audience of approximately £1m listeners.
- 4.3 An article on philanthropic activity in the City was published in the February edition of Civil Society which referred to the Trust and your City Philanthropy activities. It can be found here: [http://www.civilsociety.co.uk/fundraising/news/content/14365/whats\\_in\\_februarys\\_fundraising\\_magazine](http://www.civilsociety.co.uk/fundraising/news/content/14365/whats_in_februarys_fundraising_magazine)
- 4.4 An interview with the Lord Mayor was published in the Sunday Express on 31<sup>st</sup> March 2013. It refers to the City Bridge Trust and to some of the work being undertaken under the City Philanthropy banner and it can be viewed here:

<http://www.express.co.uk/finance/personalfinance/388293/Square-Mile-is-still-a-safe-haven>

## Growing Localities

- 4.5 Press releases on several of the grants awarded on the horticultural training strand of Growing Localities, acknowledging the support of the City of London Corporation and the Trust, have appeared in a number of local press outlets, as set out in the table below:

Organisation	Press
Trees for Cities	South London Press
St Mungo's	Haringey Independent
St Mary's Secret Garden	Hackney Gazette
Green Corridor	Ealing & Acton Gazette
Otesha Project	Hackney Gazette

## Working with Londoners

- 4.6 Civil Society magazine published an article by Tim Wilson on 28<sup>th</sup> February. *Giving in turbulent times* talked about how the Trust, with a rich history rooted in medieval times, approaches giving in modern times. The article was based on a talk given by Tim at Gresham College last autumn.
- 4.7 An article by Sandra Davidson entitled *My Week* was published in the 20<sup>th</sup> March edition of Third Sector magazine. This provided an opportunity to promote the work of the Trust through the lens of an officer's typical working week. The article can be found here <http://www.thirdsector.co.uk/Fundraising/article/1174813/>
- 4.8 Local and trade press coverage has been obtained as set out below:

Organisation	Grant	Press
Timebank	£80,000 over 2 years towards a programme matching skilled volunteers with small charities.	Charity News
Hackney Caribbean Elderly Organisation	£53,150 over 3 years towards a project addressing dementia amongst African-Caribbean elders.	Hackney Gazette, Islington Gazette
Hackney Quest	£120,000 over 3 years towards a volunteering programme.	Hackney Gazette, Islington Gazette
London Migration Museum	£50,000 over 2 years towards an education programme.	Museums Journal

## **Social Media**

- 4.9 Champollion has continued to work with your officers help support them in making increased use of Twitter and other social media.
- 4.10 As reported last month, Champollion has developed a microsite, 'Parklife London', for Growing Localities that acts as a map-based listing service of green spaces in London, that also enables your grantees to promote their work and volunteering opportunities to the general public. Visitors are able to submit their own organisation's event listings and volunteering opportunities.
- 4.11 The microsite was 'soft-launched' during half-term week in February. Over the past month it has received 1,837 pageviews, 58% of which are new visitors. The level of engagement has been relatively high, with the average visit lasting for 4 minutes.
- 4.12 Time Out magazine published an online piece about the Parklife London website. The article can be found here:
- <http://now-here-this.timeout.com/2013/03/31/park-it-londons-hidden-green-spaces>
- 4.13 Officers from the Trust and Open Spaces, together with Champollion, have met with Greenspace Information Greater London (GIGL) to explore the possibility of data sharing in order to build the content of Parklife London.

Clare Thomas, Chief Grants Officer  
020 7332 3713  
[clare.thomas@cityoflondon.gov.uk](mailto:clare.thomas@cityoflondon.gov.uk)  
Report written: 3<sup>rd</sup> April 2013

This page is intentionally left blank



## THE CITY BRIDGE TRUST

### Professional Development Events, Conferences and Seminars Attended 29<sup>TH</sup> January to 2<sup>ND</sup> April 2013

<b>Date</b>	<b>Organisation</b>	<b>Type of Event</b>	<b>City of London's Representative</b>	<b>Location/ Borough</b>	<b>Summary Comments</b>
05/02/13	Fine Cell Work	Monitoring Visit	Deputy Joyce Nash; Deputy Chief Grants Officer	Wandsworth Prison	Fine Cell Work uses trained volunteers to teach needlework to serving prisoners – 75% of them men. It was both an interesting and a valuable visit to be able to actually talk to both the volunteers and the prisoners who had opted to join this group.
06/02/13	Beacon Fellowship Charitable Trust	Beacon Awards	The Chairman; Several Members; Chief Grants Officer; Deputy Chief Grants officer	Mansion House	Please see the Chief Grants Officer's Progress Report for details.
11/02/13	Foundations Forum	Meeting	Chief Grants Officer	Royal Institution of Great Britain, London W1	A regular meeting of trusts and foundations. The guest speaker was Campbell Robb, CEO of Shelter England.
18/02/13	Just Fair	Lecture	Chief Grants Officer	Doughty Street Chambers, London WC1	A lecture on the topic of 'Freedom from Hunger: Realising the Right to Food in the UK', Chaired by Baroness Ruth Lister (Parliamentary Joint Committee on Human Rights and Patron of Just Fair).
20/02/13	Trust for London	Meeting	Chief Grants Officer	Resource for London, Holloway Road, London N7	The Chief Grants Officer was invited to visit Resource for London to see their progress over the last 18 months and to discuss opportunities for joint working and funding.
21/02/13	City of London Corporation	Meeting	Chief Grants Officer	Guildhall	A meeting to discuss impact measurement of the Lord Mayor's Appeal.

21/02/13	Mayor's Fund for London	Meeting	Chief Grants Officer	Guildhall	A meeting to discuss numeracy and the possibility of joint working.
23/02/13	London Funders	Meeting	Jemma Grieve Combes, Grants Officer	Euston	Members' meeting on monitoring and evaluation issues for funders with presentations from the Big Lottery Fund and Charities Evaluation Services.
05/03/13	Cranfield Trust	Reception	Chief Grants Officer	Salter's Hall	Networking reception in the presence of HRH The Princess Royal, Patron of The Cranfield Trust, to hear about recent developments and meet other supporters.
07/03/13	Association of Charitable Foundations	Chairs' Reception	The Chairman	Royal Society for the Arts, London WC2	A lecture and reception for Chairmen of charitable foundations. Lord Hodgson addressed the gathering about his recent report and the event was chaired by a former member of CBT staff, Sara Llewellyn.
08/03/13	Association of Charitable Foundations	Seminar	Tim Wilson, Principal Grants Officer	Euston	A seminar for funders with a common interest in gathering better impact evidence from grantees
12/03/13	New Philanthropy Capital	Event	Jemma Grieve Combes, Grants Officer	Bankside Community Space	Launch of a blueprint for shared measurement in the voluntary sector as part of the Inspiring Impact programme.
18/03/13	London Funders	Event	Ciaran Rafferty, Principal Grants Officer; Jemma Grieve Combes, Grants Officer	Blackfriars	Event to reflect on issues in funding the VCS in London in 2013. Officers took part in roundtable discussions on voluntary sector infrastructure support and advice providers.
19/03/13	London Funders	Seminar	Ciaran Rafferty, Principal Grants Officer; Jemma Grieve Combes, Grants Officer	Euston	Seminar to discuss trends in the level and quality of applications to London's funders.
19/03/13	City of London Corporation	Sustainable City Awards	Several Members; Sandra Davidson, Grants Officer; Cheryl Belmont, Executive Assistant	Mansion House	Please see Chief Grants Officer's Progress Report for details.

25/03/13	Pesticide Action	Monitoring visit	Alderman Alison Gowman; Tim Wilson, Principal Grants Officer	EC2	The formal report of this visit is presented elsewhere in your papers today.
27/03/13	Triangle Arts Trust	Monitoring visit	Jeremy Mayhew; Tim Wilson, Principal Grants Officer	Oval	You are funding Triangle Arts' <i>Even Better Together</i> community arts programme, bringing different communities together. The visit provided an enjoyable opportunity to participate in a workshop and see first-hand how the creative arts can enable the sharing of different cultural perspectives to foster greater cross-cultural understanding.
27/02/13	All Change Arts	Conference	Ciaran Rafferty, Principal Grants Officer; Anita Williams, Payments Officer	Sadler's Wells Theatre	A half-day conference on the work of All Change Arts in assisting family relationships in Islington (which you funded under your Tackling Violence programme). The event was attended by over 50 people.
12/03/13	DiVA	Seminar	Ciaran Rafferty, Principal Grants Officer	Channel 4, Horseferry Rd	A presentation by DiVA – an organisation which delivers accredited training to apprentices in the creative industries.
14/03/13	LB Islington	Seminar	Ciaran Rafferty, Principal Grants Officer	Islington Town Hall	An event hosted by LBI Arts Department to garner interest amongst local arts organisations in applying for Arts Council funding for apprenticeships.
27/03/13	Tricycle Theatre	Performance of Minding the Gap	Ciaran Rafferty, Principal Grants Officer	Tricycle Theatre, Kilburn	You are funding a project called Minding the Gap whereby the Tricycle Theatre uses arts and drama techniques to support the inclusion of young refugees who have limited or no English language skills. Their performance, in front of some of their teachers, was very uplifting.

**General Events and Receptions  
Attended 29<sup>th</sup> January to 2<sup>nd</sup> April 2013**

<b>Date</b>	<b>Organisation</b>	<b>Type of Event</b>	<b>City of London's Representative</b>	<b>Location/ Borough</b>	<b>Summary Comments</b>
29/01/13	The Stroke Association	Reception	The Chairman	The Ritz Hotel	A reception to mark the launch of the Stroke Association's new project, "Back to Work", targeted at young people who have suffered a stroke.
05/02/13	Calouste Gulbenkian Foundation	Dinner	Chief Grants Officer	Hoxton Square, London N1	A dinner for members of trusts and foundations supporting the arts; to explore common interests.
07/02/13	Natural History Museum	Reception	Chief Grants Officer	Natural History Museum	A reception, in the presence of Sir David Attenborough, to mark the opening of "Extinction", an exhibition focussing on conservation.
12/02/13	Big Society Capital	Reception	Tim Wilson, Principal Grants Officer	Deutsche Bank (London Wall)	An evening reception for organisations interested in social investment to launch the publication of "The Good Investor"
13/02/13	The Garden Museum	VIP Visit	Mrs Littlechild	Lambeth, London SE1	A visit in the presence of HRH The Duchess of Cornwall, to precede the Floriculture exhibition (please see next item).
14/02/13	The Garden Museum	Reception	The Chairman	Lambeth, London SE1	A private viewing of Floriculture, Flowers, Love and Money; an exhibition of art about horticulture.
26/02/13	Charterhouse	Lunch	The Chairman	Charterhouse	The Chairman was invited to a tour and lunch at the Charterhouse to discuss the forthcoming exhibition on Philanthropy. The Chairman was pleased to renew acquaintance with this historic organisation.

26/02/13	City of London Corporation	Dinner	The Chairman; Chief Grants Officer; Tim Wilson, Principal Grants Officer	Haberdashers' Hall	The Chairman of the Investment Committee invited the Chairman, the Chief Grants Officer and the Principal Grants Officer to his Committee's Dinner, with guest speaker Lord Mawson OBE.
27/02/13	City of London Corporation	Senior Managers' Forum	Chief Grants Officer	Mansion House	To hear from the Chairman of the Policy & Resources Committee and the Town Clerk, on the City of London Corporation's plans and priorities for the year ahead; as well as an update on corporate-wide issues and on the financial situation.
27/02/13	Reform	Dinner	Chief Grants Officer	Guildhall	A Dinner with the Minister for Civil Society in partnership with think tank Reform and hosted by the Chairman of the Policy & Resources Committee, to discuss the Big Society Agenda and Social Investment.
05/03/13	The Stroke Association	Reception	The Chairman	Lord and Lady Fink's home, N1.	A reception hosted by Lord and Lady Fink to mark the changeover of Chairman of the Stroke Association.
28/03/13	Domestic Violence Intervention Project	Reception	Jemma Grieve Combes, Grants Officer	Africa Centre, Covent Garden	Reception to celebrate the 21 <sup>st</sup> birthday of the Domestic Violence Intervention Project.
06/03/13	City of London Corporation	Dinner	Chief Grants Officer	Guildhall	The Chairman of the Policy & Resources Committee invited the Chief Grants Officer to his Committee's Dinner, with guest speaker The Rt Hon Greg Clark MP, Financial Secretary to the Treasury.
08/03/13	City of London Corporation	Breakfast	Chief Grants Officer	Guildhall	Breakfast for International Women's Day, Chaired by Janet Ellis, presenter, actress and Patron of Refuge; to acknowledge women's success and contribution to the workplace and to society.

13/03/13	Jewish Care	Breakfast	The Chairman	Mandarin Hotel	A breakfast for patrons. The Speaker of the House of Commons, John Bercow, addressed the group. CBT were thanked for our help with their work for Alzheimer's sufferers.
14/03/13	Connaught Opera	Concert	The Chairman	The British Hospital for Incurables	Connaught Opera entertained the patients, their relatives and friends.
18/03/13	ShareAction (formerly FairPensions)	Lecture and reception	The Chairman, several Members and City Bridge Trust officers	Guildhall	Please see the Chief Grants Officer's Progress Report for details.
19/03/13	Westminster House Youth Club	Reception	Sandra Davidson, Grants Officer; Cheryl Belmont Executive Assistant	Girdlers' Hall	A fundraising event to celebrate the Youth Club's 125 <sup>th</sup> Anniversary. The event provided an opportunity to talk to some of the young people and to hear more about the Youth Club's work.
20/03/13	Zoological Society of London	Reception	The Chairman; Ciaran Rafferty, Principal Grants Officer	London Zoo	Reception to mark the opening of new Tiger Territory, where a CBT grant has helped to provide disabled access, giving disabled people a better view of the tigers. The Chairman was presented to HRH The Duke of Edinburgh, who opened the new facility.
21/03/13	St Peter de Beauvoir	'Open House'	Sandra Davidson, Grants Officer	The Crypt, St Peter's Church	An 'Open House' event to celebrate the opening of the new, fully accessible community space which the Crypt has become, partly-funded by CBT; and to launch St Peter's Community Partnership.
22/03/13	The Barrow Cadbury Trust	Reception	The Chairman; Tim Wilson, Principal Grants Officer	Church House	A reception to mark the publication of "A History of the Barrow Cadbury Trust"
25/03/13	Duke of Edinburgh's Award	Reception	The Chairman	St James's Palace	A reception for supporters of the Duke of Edinburgh's Award. The Chairman was presented to HRH the Earl of Wessex.

13/02/13	Chinese Association Tower Hamlets	Reception	Ciaran Rafferty, Principal Grants Officer; Sandra Davidson, Grants Officer	Canary Wharf	Reception to celebrate the 30 <sup>th</sup> anniversary of this organisation which you are currently supporting.
05/03/13	Action for Stammering Children	Reception	Ciaran Rafferty, Principal Grants Officer	Speaker's House, Palace of Westminster	An event to celebrate the 20 <sup>th</sup> anniversary of the Michael Palin Centre.
21/03/13	Rambert Dance	Showcase	Ciaran Rafferty, Principal Grants Officer; Ibrahim Hussein, Clerical Assistant	Queen Elizabeth Hall, South Bank	An event to showcase Rambert's community programme, with 15 schools admirably displaying their dance skills.

This page is intentionally left blank



<b>Committee(s):</b>	<b>Date(s):</b>
City Bridge Trust	18 April 2013
<b>Subject:</b> Grant Recommendations - Introductory Paper	<b>Public</b>
<b>Report of:</b> Chief Grants Officer	<b>For Decision</b>
Ward (if appropriate): N/A	
<p><b><u>Summary</u></b></p> <p>This report deals with recommendations relating to applications received on your current grants programmes.</p> <p>A total of 67 Working with Londoners applications will be dealt with at this meeting. Of these, one is a Strategic Initiative, 16 are recommended for a grant, 29 are recommended for rejection, and 11 have been withdrawn. 10 grants are also noted as having been recommended under delegated authority. The total recommended sum is £1,430,095. 25 applications are also recommended for funding under the "Get Young People Working – The Youth Offer" programme for a total recommended amount of £2,599,123.</p> <p style="text-align: center;"><b><u>Recommendations</u></b></p> <p><b>That you:</b></p> <ul style="list-style-type: none"> <li>a) note the contents of the report</li> <li>b) consider the individual grant recommendations in relation to the applications set out in the summary schedule and other papers</li> </ul>	

## **Main Report**

### **1.0 Introduction**

1.1 This paper summarises the action taken on grant applications received, and tracks spend on your grant making at each Committee meeting for the current financial year. Sections 2 to 5 deal with your Working with Londoners programme including applications, Strategic Initiatives and Eco-audits and revocations/writebacks. Section 6 deals separately with one-off additional programmes funded from surplus income within Bridge House Estates. A summary of overall spend against your current year grants budget is provided at the end of this report.

1.2 Your policy guidance is presented in a loose-leaf folder entitled "Members' Handbook". It includes the priorities and exclusions that were ratified for the Trust by the Court of Common Council, in April 2008. It is also available on the intranet.

## 2.0 Working with Londoners

2.1 In the period 1<sup>st</sup> July 2012 to 30<sup>th</sup> September 2012, 101 applications were received. Of these, five are recommended for a grant today, one has been recommended for a grant under delegated authority, two are recommended for rejection and three have been withdrawn, leaving four pending.

**Table 1: Applications received 1<sup>st</sup> July – 30<sup>th</sup> September 2012**

	Committee Date							Total
	Jul 12	Sep 12	Oct 12	Nov 12	Jan 13	Feb 13	Apr 13	
<b>Strategic Initiatives</b>	1	1						<b>2</b>
<b>Grants / Recs</b>		1	4	8	12	7	5	<b>37</b>
<b>Delegated Gr</b>		2			1		1	<b>4</b>
<b>Rejs/Recs</b>		6	20	3	4	5	2	<b>40</b>
<b>Withdrawn</b>		2	1	2	3	3	3	<b>14</b>
<b>Lapsed</b>								<b>0</b>
<b>Pending</b>	N/A	N/A	N/A	N/A	N/A	N/A	4	<b>4</b>
<b>TOTAL</b>	<b>1</b>	<b>12</b>	<b>25</b>	<b>13</b>	<b>20</b>	<b>15</b>	<b>15</b>	<b>101</b>

2.2 In the period 1<sup>st</sup> October 2012 to 31<sup>st</sup> December 2012, 103 applications were received. Of these, nine are recommended for a grant today, two have been recommended for a grant under delegated authority, 14 are recommended for rejection and five have been withdrawn, leaving 25 pending.

**Table 2: Applications received 1st October – 31st December 2012**

	Committee Date					Total
	Oct 12	Nov 12	Jan 13	Feb 13	Apr 13	
<b>Strategic Initiatives</b>	2	4	1			<b>7</b>
<b>Grants / Recs</b>	1	1	2	3	9	<b>16</b>
<b>Delegated Gr</b>	1	1	2	2	2	<b>8</b>
<b>Rejs/Recs</b>			12	11	14	<b>37</b>
<b>Withdrawn</b>				5	5	<b>10</b>
<b>Lapsed</b>						<b>0</b>
<b>Pending</b>	N/A	N/A	N/A	N/A	25	<b>25</b>
<b>TOTAL</b>	<b>4</b>	<b>6</b>	<b>17</b>	<b>21</b>	<b>55</b>	<b>103</b>

- 2.3 In the period 1<sup>st</sup> January 2013 to 31<sup>st</sup> March 2013, 108 applications were received. Of these, two are recommended for a grant today, seven have been recommended for a grant under delegated authority, 13 are recommended for rejection and three have been withdrawn, leaving 81 pending.

**Table 3: Applications received 1st January – 31<sup>st</sup> March 2013**

	Committee Date			
	Jan 13	Feb 13	Apr 13	Total
<b>Strategic Initiatives</b>		1		<b>1</b>
<b>Grants / Recs</b>		1	2	<b>3</b>
<b>Delegated Gr</b>			7	<b>7</b>
<b>Rejs/Recs</b>			13	<b>13</b>
<b>Withdrawn</b>			3	<b>3</b>
<b>Lapsed</b>				<b>0</b>
<b>Pending</b>		N/A	81	<b>81</b>
<b>TOTAL</b>	<b>0</b>	<b>2</b>	<b>106</b>	<b>108</b>

- 2.4 In the period since 1<sup>st</sup> April 2013 1 application has been received. This is a strategic initiative, to be considered for a grant today.

### **3.0 Strategic Initiatives**

- 3.1 There is one new Strategic Initiative to be considered today.

**Table 4: Strategic Initiatives 2013/14**

Strategic Initiatives	Committee date	£
<b><i>For this meeting:</i></b>		
Access and Sustainability Advisory Service	18/04/13	192,900
	<b>Total</b>	<b>192,900</b>
<i>Sum available (5% of total Working with Londoners budget)</i>		<i>747,500</i>
<i>Balance remaining</i>		<i>554,600</i>

### **4.0 Working with Londoners summary**

- 4.1 From Table 5 you will see that a total of 67 Working with Londoners applications will be dealt with at this meeting. The total recommended sum is £1,430,095.

**Table 5: Applications at this meeting – Summary**

<b>Status</b>	<b>Number</b>
Strategic Initiatives	1
Working with Londoners grants recommended	16
Working with Londoners grants delegated authority	10
Working with Londoners grants rejections recommended	29
Working with Londoners grants withdrawn	11
Working with Londoners grants lapsed	0
<b>Total applications</b>	<b>67</b>
<b>Working with Londoners grants recommended total</b>	<b>£1,237,195</b>
<b>Working with Londoners strategic initiatives</b>	<b>£192,900</b>
<b>Total recommendations</b>	<b>£1,430,095</b>

- 4.2 From Table 6 you will see the relative distribution of grants this financial year, across your programme areas.

**Table 6: Grants in 2013-14 – by Programme**

<b>Programme Area</b>	<b>Year to date</b>	<b>This meeting</b>	<b>Total</b>
<b><i>Working with Londoners</i></b>	£	£	£
Accessible London	0	197,700	197,700
Bridging Communities	0	79,120	79,120
Improving Mental Health	0	143,000	143,000
London's Environment	0	86,500	86,500
Older Londoners	0	147,500	147,500
Positive Transitions	0	256,350	256,350
Strengthening Third Sector	0	316,900	316,900
Exceptional Grants	0	0	0
Strategic Initiatives	0	192,900	192,900
Greening the third sector eco-audits	0	10,125	10,125
<b>Total Working with Londoners</b>	<b>£0</b>	<b>£1,430,095</b>	<b>£1,430,095</b>

## **5.0 Working with Londoners write-backs and revocations**

- 5.1 No write-backs or revocations have been approved in the year April 2013 to date. Table 7 provides, for information, a summary of write-backs and revocations approved under delegated authority in the year 2012/13 since your last meeting. (More detail on each of these is presented elsewhere in your papers today.) The balance has been added to the underspend request detailed in Table 8.

**Table 7: Remaining Working with Londoners Write-backs and Revocations 2012/13**

<b><i>Since your last 2012/13 meeting:</i></b>	<b>£</b>
Bromley Bowling Club Ltd	432
City Bridge Trust (The Lord Mayors Show)	286
Grandparents' Association	2,500
Institute for Voluntary Action Research	255
Merton MIND	40,000
St Paul's Cathedral Foundation	1,514
St Paul's Church, Hainault	42,600
Wandsworth Women's Aid	7,900
<b>Total</b>	<b>95,487</b>

## **6.0 Additional grants**

- 6.1 **Get Young People Working – The Youth Offer:** In September 2012 you approved the priorities for a programme of work to help tackle the growing problem of rising numbers of young people not in employment, education or training (NEETs). The Court of Common Council agreed to allocate an additional £3.2 million from Bridge House Estates towards this programme. Each of the 32 London local authorities was then invited to apply for funding of up to £100,000 over a 2 year period. More detail of this scheme is presented elsewhere in your papers today.
- 6.2 25 applications are recommended for a grant under the Get Young People Working programme leaving a further 6 pending (one application is a joint-bid from two boroughs). Full details are provided in separate papers at today's meeting. The total recommended amount is £2,599,123.

## **7.0 Summary of Spend 2013-14**

- 7.1 Table 8 (at the end of this paper) summarises the original budgets for 2013-14, including your core grants programme (Working with Londoners) and your one-off additional programme (Get Young People Working – The Youth Offer).
- 7.2 This table also shows the implications of Strategic Initiatives of £192,900 for 2013/14 to date; today's grant recommendations of £1,237,195 under Working with Londoners; and today's recommendations of £2,599,123 under the Get Young People Working programme.
- 7.3 A sum of £13,519,905 remains unspent on your Working with Londoners grants budget for 2013/4. This excludes the sum of

£2,925,487 unspent in 2012/13 for which approval is currently being sought to carry forward to this financial year.

**Recommendations:**

**That you**

- a) note the contents of the report.
- b) consider the individual grant recommendations in relation to the applications set out in the summary schedule and other papers.

**Contact:**

**Jemma Grieve Combes, Grants Officer - 020 7332 3174**

[jemma.grievecombes@cityoflondon.gov.uk](mailto:jemma.grievecombes@cityoflondon.gov.uk)

*Report written: 03/04/2013*

**Table 8: Grants budget 2013/14**

	Working with Londoners		Additional budget (Get Young People Working)	
	£	£		£
<b>Original Grants Budget for 2013/14</b>		<b>14,950,000</b>		<b>3,200,000</b>
<b>Write-Backs &amp; Revocations 2013/14</b>	0			
<b>Total Budgets Available</b>		<b>14,950,000</b>		<b>3,200,000</b>
	Approved /Recommended	Budget Remaining	Approved /Recommended	Budget Remaining
	£	£	£	£
<b>Strategic Initiatives</b>	192,900	14,757,100		
<b>Applications at Committee</b>				
April 2013	1,237,195	13,519,905	2,599,123	600,877
May 2013		13,519,905		
June 2013		13,519,905		
July 2013		13,519,905		
September 2013		13,519,905		
October 2013		13,519,905		
November 2013		13,519,905		
January 2014		13,519,905		
February 2014		13,519,905		
March 2014		13,519,905		
<b>Sub-total spend for 2013/14</b>	<b>1,430,095</b>		<b>2,599,123</b>	
<b>Total remaining budget for 2013/14</b>		<b>13,519,905</b>		<b>600,877</b>
<b>Carry forward from 2012/13 (to be approved)</b>		2,925,487		
<b>Total 2013/14 budget remaining (if carry forward approved)</b>		16,445,392		

This page is intentionally left blank



## THE CITY BRIDGE TRUST

### The City Bridge Trust Committee - 18 April 2013

#### Summary of Grant Recommendations

Annex No.	Ref No.	Organisation	Requested Amount	Recommended Amount	Page No.
<b><u>Accessible London</u></b>					
1	11462	Markfield Project	£166,910	£99,000	
2	11473	Misgav	£56,499	£56,500	
<b><i>Total Accessible London</i></b>			<b>£223,409</b>	<b>£155,500</b>	
<b><u>Bridging Communities</u></b>					
3	11288	Merton Home Tutoring Service	£36,562	£34,120	
4	11313	British Muslims for Secular Democracy	£45,000	£45,000	
<b><i>Total Bridging Communities</i></b>			<b>£81,562</b>	<b>£79,120</b>	
<b><u>Improving Londoners' Mental Health</u></b>					
5	11365	Latin American Women's Aid	£96,560	£96,500	
6	11588	St Cuthbert's Centre	£46,500	£46,500	
<b><i>Total Improving Londoners' Mental Health</i></b>			<b>£143,060</b>	<b>£143,000</b>	
<b><u>London's Environment</u></b>					
7	11596	Federation of London Youth Clubs (London Youth)	£57,786	£55,000	
<b><i>Total London's Environment</i></b>			<b>£57,786</b>	<b>£55,000</b>	
<b><u>Older Londoners</u></b>					
8	11589	Age UK Enfield	£97,586	£97,500	
9	11389	Hestia Housing & Support	£50,000	£50,000	
<b><i>Total Older Londoners</i></b>			<b>£147,586</b>	<b>£147,500</b>	
<b><u>Positive Transitions to Independent Living</u></b>					
10	11497	Kingston Centre For Independent Living	£133,653	£133,000	
11	11618	Muscular Dystrophy Campaign	£42,538	£42,500	

**THE CITY BRIDGE TRUST**  
**The City Bridge Trust Committee - 18 April 2013**  
**Summary of Grant Recommendations**

Annex No.	Ref No.	Organisation	Requested Amount	Recommended Amount	Page No.
12	11487	Stroke Association	£80,855	£80,850	

***Total Positive Transitions to Independent Living* £257,046 £256,350**

**Strengthening the Third Sector**

13	11547	CREATE London	£175,000	£75,000	
14	11316	Pilotlight	£50,925	£51,000	
15	11640	Heart of the City	£108,640	£108,000	
16	11438	Forum for Health and Wellbeing	£58,886	£58,900	

***Total Strengthening the Third Sector* £393,451 £292,900**

**Strategic Initiatives**

17	11741	City Bridge Trust - Access and Sustainability Advisory Service	£192,900	£192,900	
----	-------	--	----------	----------	--

***Total Strategic Initiatives* £192,900 £192,900**

**Grand Totals £1,496,800 £1,322,270**

**ASSESSMENT CATEGORY - Accessible London – arts & sports**

**Markfield Project**

**Ref: 11462**

**Amount requested: £166,910**

**Adv: Joan Millbank**

**Base: Haringey**

**Benefit: Haringey,**

**Islington and Hackney**

**Purpose of grant request:** For staffing and associated costs of running weekly arts, social and sports sessions for adults with moderate learning disabilities and/or autism on a termly basis.

**Background**

Markfield promotes the dignity, choice, independence and inclusion of disabled people and their families. It has been providing services for people with learning disabilities (PwLDs) for over thirty years. Currently it provides a wide range of groups and clubs, information and advice sessions to address disabled people's needs through childhood, adolescence and into adulthood. It runs the Parent Partnership Service with funding from Haringey Council, which provides independent support to parents of children with Special Educational Needs (SEN).

**Funding History**

In 2007 you awarded a three year grant to employ a family worker. The grant was satisfactorily monitored.

**Current Application**

This application is seeking funding towards provision of accessible art, sports and leisure activities for adults with a moderate learning disability and/or autism aged 18 to 65 years. The work will build on the organisation's experience in providing such activities for adults with learning disabilities who qualify for statutory day care provision or personal budgets. However, your grant, if agreed, will target those who are ineligible for statutory support but who still have a need because of their disability and social isolation. Evidence of need has been gathered from PwLDs, their parents/carers, and from statutory authorities. National and local reports (The Learning Disability Coalition 2012) highlight increasing levels of unmet need as eligibility thresholds tighten due to public expenditure savings.

The project will deliver 8 additional places on a daytime arts group and/or an evening leisure group each week; and 12 places on a new evening arts, leisure and sports group. Each session will run for 2.5 hours, three x twelve weeks per year. Planning of activities will be managed through a users' committee, who will be trained and supported to carry out the role. Arts activities will include workshops with local artists, trips to art galleries and craft sessions. Sports and leisure activities will include dance,

swimming, music, yoga, Tai Chi and gym work. Tottenham Hotspur Football Club is offering football training. Activities will take place within the Markfield Centre or at local venues as appropriate. Travel training, volunteers and peer travel buddies will be provided to help participants attend sessions. Twenty people will directly benefit at any one time and forty people are expected to directly benefit over a three year period. Success will be measured through participation in activities, an increase in self-care, a decrease in challenging behaviour from participants and progression onto other activities.

### **Financial Observations**

The audited accounts for the year ended 31st March 2012 show income of £565,708 and an end-of-year deficit of £77,893 (13.8 % of turnover), which was mainly on restricted funds (£62,331). The charity's reserve policy states that the organisation aims to hold free reserves equivalent to 4 to 6 months running costs, which equates to £194,874 to £292,311 based on budgeted current year expenditure. At 31st March 2012 free unrestricted reserves stood at £120,269, which equates to 2.5 months' worth of total expenditure.

The latest forecast for the year ending March 2013 shows income of £640,448, which the charity advises is all secured, and a projected surplus of £9,686. This comprises a surplus on unrestricted activity of £11,583, partially offset by a deficit on restricted funds of £1,897.

The 2013-14 budget show an overall deficit of £4,339, which relates entirely to restricted funds. Income is estimated to total £580,282 for the year and, to date, grant and contract income of £340,000 (59%) has been secured.

### **Officer's Appraisal**

Markfield provides a range of valued services and support for people with learning disabilities and their parents/carers. Your funding would help Markfield provide accessible arts, leisure and sports activities to adults with moderate learning disabilities and those with autism who, despite their individual needs, do not qualify for statutory support. Since submitting the application the organisation has modified its bid and reduced its costs as reflected in Appendix A. Full project costs are sought including 360 hours (10 hours x 36 week) towards the project manager's salary (who will also act as session leader) and for sessional staff. Additional support will be provided by volunteers and members providing peer support, who will receive expenses where due.

### **Recommendation**

**A grant of £99,000 over three years (3 x £33,000) towards the staffing and running costs of providing adults with moderate learning disabilities and/or autism with opportunities to participate in accessible arts, leisure and sports activities.**



# The City Bridge Trust

Charity Registration Number: 1035628

## Working with Londoners: Application for a grant

Please read the guidance notes before completing this form

Reference:  
(office use only)

11462

Date Received:

01/11/2012

Programme  
Area:

01

### 1. About your organisation

Name of organisation applying for grant: <b>The Markfield Project</b>	
If the organisation is part of a larger organisation, what is its name? <b>N/A</b>	
Address for correspondence: <b>Markfield Road London</b>	
Postcode: <b>N15 4RB</b> Is this your home address? <b>No</b>	
Contact person: <b>Ms Sarah Miller</b>	Position: <b>Director</b>
Phone: <b>020 8800 4134</b>	Fax: <b>020 8800 1495</b>
E-mail: <b>smiller@markfield.org.uk</b>	
Website: <b>http://www.markfield.org.uk</b>	
Legal status of organisation: <b>Company Limited by Guarantee</b>	
If registered, please give charity number: <b>289904</b>	
Date organisation established: <b>24/01/1983</b>	

RECEIVED  
The City Bridge Trust  
08 NOV 2012  
MH

### 2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? <b>Accessible London - Accessible Arts &amp; Sports</b>
Purpose for which funds are requested: (25 words maximum) <b>For staffing and associated costs of running a weekly arts session and a weekly social &amp; sports session for adults with Learning Disabilities and/or Autism.</b>
How much funding is requested? <b>Year 1: £54,538 Year 2: £55,629 Year 3: <del>£56,741</del> Total: £166,908</b> <b>£56,743 £166,910</b> JM

### 3. Aims of your organisation

Markfield is a community centre in Haringey which promotes the dignity, choice, independence and community inclusion of Disabled people and their families. Our charity has a strong track record of providing high-quality services. Markfield uses the words 'Disabled people' to mean people who are isolated or excluded from full participation in society. We operate within the 'Social Model' of disability. This says it is society that 'disables' people. All the physical and economic barriers in the world, inflexibility in meeting needs and negative attitudes are what stops Disabled people leading full lives. Over the last 33 years Markfield has grown and developed beyond its original play-based services to provide a broad range of support services to Disabled children, adults and their families. An important part of our ethos is that we focus on the needs of the whole family. We particularly specialise in supporting people who have experienced difficulties accessing other provision or who have been labeled as 'challenging'.

### 4. Main activities of your organisation

Our current services include:

- Inclusive after school and holiday play services for 5-12 year olds which support Disabled and non-Disabled children to build positive relationships through play
- Innovative youth services where 11-19 year olds are supported to develop independence, self esteem, and citizenship skills
- Leisure services for adults with learning disabilities giving access to opportunities that are self-chosen and support active community participation
- Family support services including advice, advocacy and information, family training and befriending. Mutual support is encouraged through drop in groups such as our parent group, under 5s drop in, family club, and family activity days in our Adventure Playground
- Community initiatives which promote awareness of Disabled people's rights and needs, challenge discrimination and encourage inclusion. These include: training, volunteering opportunities, representation on policy forums and community use of Markfield's resources.

### 5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
<b>7</b>	<b>21</b>	<b>9</b>	<b>12</b>

### 6. How do you support your volunteers?

Our volunteers receive a structured training and induction programme delivered by our full-time Volunteer Co-ordinator. They are supported with regular supervision and they are offered on-going training that is relevant to their role.

### 7. Property occupied by your organisation

Is the main property owned or leased/rented by your organisation?	If leased/rented, how long is the outstanding lease/rental agreement?
<b>Leased</b>	<b>renewal under negotiation</b>

## 8. Finance

From your most recent audited or independently examined accounts, complete the following:

Financial year ended - **Month: March**

**Year: 2012**

<b>Income received from:</b>	<b>£</b>
Voluntary income	110,460
Activities for generating funds	7,464
Investment income	1,027
Income from charitable activities	446,211
Other sources	546
<b>Total Income</b>	<b>565,708</b>

<b>Expenditure:</b>	<b>£</b>
Charitable activities	620,654
Governance costs	15,975
Cost of generating funds	6,972
Other	0
<b>Total Expenditure:</b>	<b>643,601</b>
<b>(Deficit)/surplus for the year:</b>	<b>(77,893)</b>

<b>Asset position at year end:</b>	<b>£</b>
Fixed assets	55,502
Investments	0
Net current assets (liabilities)	153,483
Long-term liabilities	0
<b>*Total A:</b>	<b>208,985</b>

<b>Reserves at year end:</b>	<b>£</b>
Endowment funds	0
Restricted funds	59,945
Unrestricted funds	149,040
<b>*Total B:</b>	<b>208,985</b>

\* Total A and Total B must be the same and should be taken from your balance sheet

## 9. Statutory funding

For the financial year above, what % of your income was from statutory sources?  
**80%**

## 10. Material changes

Describe any material changes to the organisation's activities, structure or financial position since the date of the most recent accounts:

**We have restructured the management and support team to reduce overhead costs. There is now one full-time Director (previously one full-time director and one part-time Fundraising Director).**

## 11. Previous applications to the Trust

Have you applied to the Trust before? If so, please give details:

Month/Year:	12/06	Ref:	7821	Grant received:	£101,500	OR application rejected?	No
Month/Year:	09/01	Ref:	0	Grant received:	£60,000	OR application rejected?	No
Month/Year:	02/96	Ref:	0	Grant received:	£32,736	OR application rejected?	No

## 12. Previous funding received

Funding received by your organisation from the following sources during the last **THREE** years:  
**(i)** City of London (other than the City Bridge Trust) **(ii)** London boroughs **(iii)** London Councils (formerly ALG)  
**(iv)** Health authorities **(v)** Central government departments **(vi)** Other statutory bodies (e.g. Housing Corporation, Arts Council) - List source, years and annual amounts:

	Year: 2009	Year: 2010	Year: 2011
(i)			
(ii) LB Haringey	375,175	439,969	408,952
(iii)			
(iv)			
(v) Dept for Education Dept of Health (Transition Fund)	10,000	10,000	10,000 61,871
(vi)			

## 13. Previous grants received

Grants received by your organisation from charitable trusts and foundations (other than the City Bridge Trust) during the last **TWO** years. List source, years and annual amounts:

	Year: 2010	Year: 2011
Leathersellers	10,000	10,000
Tottenham Grammar School Foundation	15,000	15,000
Henry Smith Charity	36,600	0
Lloyds TSB Foundation	19,900	0
BBC Children in Need	0	7,623
Help a London Child	0	4,375

## 14. What steps is your organisation taking to reduce its carbon footprint?

Markfield has an Environmental Policy and Action Plan that is reviewed regularly. We recycle paper, printer cartridges and food packaging. We have measures in place to prevent waste water. Staff are encouraged to use public transport or bicycles, and there is a bicycle storage on site. We have a low emissions compliant minibus used for service user transport, and we also support service users with travel training on public transport, reducing the need to use taxis and private cars. We use recycled paper, and encourage staff to reduce unnecessary paper usage and use recycled materials on sessions. Our refreshments are locally sourced. We minimise our use of electricity, by ensuring appliances and lights are turned off when not in use. We completed an environmental audit by a specialist agency in 2010 which identified areas of improvement, strengths, weaknesses and potential actions to improve sustainability. This audit informed our action plan.



## 15. Purpose

Complete this section whatever the amount of grant requested. **In addition**, if the request is for £25,000 or more in total, a fuller proposal should be sent with this form. Also, if your application is for all or part of new or existing post(s), please enclose a copy of the relevant job description(s) including the salary level.

**In order to provide the right information, please refer to guidance note 15 before completing this section.**

Evidence of the need for the project:

There is a need locally for more arts, sports and leisure services for adults with Learning Disabilities (LD) and/or autism. This is evidenced by: consultation that we have carried out with local carers and our long waiting list for adults services. In our work with families over many years we find that high eligibility thresholds for statutory support mean that there are many adults with LD / autism, and those with no clear diagnosis, who do not receive services and are extremely isolated. This is also reflected in government reports stating that 'people with Learning Disabilities are often socially marginalised and isolated in their community' (Valuing People Now, DoH 2009).

How the project will be delivered:

This project is to deliver sessions for people with LD: a weekly daytime arts-based session for ~~16~~<sup>12</sup> 8 people and a weekly evening sports and social session for ~~16~~<sup>10</sup> 10 people, from the Markfield Community Centre (the building is leased by us from Haringey Council).

Activities will be based on service users' interests and skills and will include opportunities to work with local artists and exhibit work. The sessions will focus on participation within the community and use local facilities, such as parks and leisure centres.

Places will be targeted to those adults with LD who are just below the needs threshold to qualify for local authority-funded services, or whose needs are not being met through existing services.

Transport or travel training support will be provided for those who need it to access the sessions.

The funding would cover part of the costs of the existing part-time Adult Project Manager post and support workers.

Project aims: • Reduction in isolation and exclusion • Promotion of choice and self expression  
• Improved mental and physical health • Promoting inclusion and contribution to the community.

Outputs will be measured through registers and service user plans. Outcomes will be measured through recording and evaluating the individual targets set in each service user's annual review.

Track record:

We have been providing high quality, innovative leisure services for people with LD for more than 30 years. We are well known and trusted within the community. Our fantastic building and location give huge scope to provide a range of activities in a safe environment. Our staff are highly trained, motivated and knowledgeable, with specialisms in sport, art and music.

How the project meets the Trust's 'accessible arts and sports' programme, and good practice principles: The project would increase confidence and self esteem of participants through physical exercise, improved local knowledge and use of community facilities as well as developing cognitive and creative skills through art.

Involving disabled people in planning and running the project: we have an established elected adult service user committee. This would be developed further for this project to involve service users in decision making over use of budgets and staff recruitment. Our forum of parent/carers of disabled adults also contributes to the planning of services.

Value diversity: Our centre is based in Tottenham, one of the most ethnically diverse communities in Europe. Our service users and staff reflect this diversity. This project will enable people to participate in art and sport activities together, which is a great way of exploring different cultural practices, enhancing shared understanding, and celebrating diversity.

Value and support volunteers: We have a well established Volunteer programme where volunteers are inducted offered supervision and training, and acknowledged with celebration events.

Steps to reduce carbon footprint: We work with our service users to increase awareness of environmental issues -- eg. by use of recycled materials and encouraging energy conservation.

**16. Explain how you will monitor and evaluate both your own outcomes and those of the programme under which you are applying.**

Outputs will be measured through data gathered in service user plans and session registers: the numbers attending the sessions, their ages, ethnicity and postcode.

Outcomes will be measured through progress towards targets set in individual annual reviews held with each service user. Examples of targets are: being able to independently access a local gym, contributing to arts fairs, taking up a new hobby, making new friends, improved communication skills, taking up a volunteer position, steps towards gaining paid employment. The reviews will use a range of accessible tools to gather service user views - such as symbol based communication systems, games and observation. Success would be measured by meeting these individual targets, as well as an overall decrease in challenging behaviour and improved self care and well-being. Evidence of this will be gathered both from service users, as well as feedback from other key people in their network, such as carers and support staff.

Evaluation of the project will also be measured through the service user committee members' ability and enthusiasm to train for and carry out roles such as minute taker, chair and treasurer. Training and support will be provided, with the aim of reducing the level of support required over time.

Service user involvement will be also evaluated through recording the origin of ideas for specific creative activities, and evidencing their progress towards realisation - for example through photographs.

**17. Beneficiaries**

How many people will benefit from the grant per year? **8 additional places on existing session, plus 12 places on a new session. Total 20 per yr.**

In which local authority is your organisation based?  
**Haringey**

Which borough(s) of Greater London will benefit from this grant?  
(if more than one, please give % for each)  
**Haringey 85% Hackney 10% Islington 5%**

At what address will the activity be located? **Markfield, Markfield Rd, London N15 4RB**

What age group will benefit? **18yrs -65yrs**

What will the ethnic grouping(s) of the beneficiaries be?

	%		%
White - British		Black - Caribbean	
White - Irish		Black - African	
White - Other (please describe)		Black - Other (please describe)	
Asian - Indian		Black - British	
Asian - Pakistani		Chinese	
Asian - Bangladeshi			
Asian - Other (please describe)		Other (please describe)	
Open to everyone			<b>x</b>

What proportion of the beneficiaries will be disabled people?  
**100%**

## 18. Funding required for the project

What is the total cost of the proposed activity/project?

(List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Project manager /session leader - salary and on-costs	17,498	17,848	18,205	53,551
Sessional support workers - salary and on costs	18,160	18,523	18,894	55,577
Staff training and travel	569	580	592	1,741
Volunteer expenses	161	164	168	493
Refreshments, session materials and trips	1,231	1,256	1,281	3,767
Transport: minibus and taxis	4,746	4,841	4,938	14,525
Building costs (utilities, maintenance, cleaning, security, reception)	4,450	4,539	4,630	13,619
Office and finance administration costs (telephone, postage, office equipment, photocopying, stationery, IT support, banking, audit, finance administration staff time)	1,535	1,566	1,597	4,698
Senior management, HR and governance costs	6,188	6,312	6,438	18,938
<b>TOTAL</b>	<b>54,538</b>	<b>55,629</b>	<b>56,741</b>	<b>166,908</b>

*56,743 166,910*

What income has already been raised? (List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
<b>TOTAL</b>				

What other funders are currently considering the proposal?

Funder	£
<b>TOTAL</b>	

## 19. Funding requested from the Trust

How much is requested from the Trust? (List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Project manager /session leader - salary and on-costs	17,498	17,848	18,205	53,551
Sessional support workers - salary and on costs	18,160	18,523	18,894	55,577
Staff training and travel	569	580	592	1,741
Volunteer expenses	161	164	168	493
Refreshments, session materials and trips	1,231	1,256	1,281	3,767
Transport: minibus and taxis	4,746	4,841	4,938	14,525
Building costs (utilities, maintenance, cleaning, security, reception)	4,450	4,539	4,630	13,619
Office and finance administration costs (telephone, postage, office equipment, photocopying, stationery, IT support, banking, audit, finance administration staff time)	1,535	1,566	1,597	4,698
Senior management, HR and governance costs	6,188	6,312	6,438	18,938
<b>TOTAL</b>	<b>54,538</b>	<b>55,629</b>	<b>56,741</b>	<b>166,908</b>

*56,743 166,910*

## 20. Funding requested from the Trust (continued)

When will the funding be required?

01/04/2013

Is the activity to continue beyond the period for which funding is requested?

If so, how will it be resourced?

**We are very experienced in managing projects that have time-limited funding. We would integrate this project within our overall fundraising strategy. Well before the ending of the funding period we will consult service users about whether they would like the project to continue, and if they do we will submit applications to alternative funders.**

If any planning or other statutory consents are required for the project to proceed, what stage have the applications reached?

**None required**

### Declaration on behalf of applicant organisation

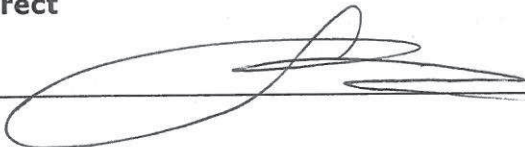
I, SARAH MILLER (your name)

am an authorised representative of

THE MARKEFIELD PROJECT (your organisation)

within which I am DIRECTOR (your position)

**To the best of my knowledge, all the information that I have provided in this application form is correct**

Signature  Date 6/11/12

### Return the completed form to: The City Bridge Trust

City of London  
PO Box 270  
Guildhall  
London EC2P 2EJ

Please

- do not send this application by fax or e-mail – unless applying online, applications must be posted to the Trust
- do send the information in the checklist – if items are missing, your application will be returned to you
- do send only the information in the checklist – if further information is required, we will contact you
- do ensure you have signed and dated this form – we cannot accept forms which have not been signed and dated
- do use the correct postage – the completed form and additional materials are likely to exceed 100g in weight

**18. Funding required for the project**

What is the total cost of the proposed activity/project?

(List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Project manager/session leader	7869	7493	7568	22930
Sessional staff	11429	11543	11659	34631
Staff training & travel	547	552	558	1657
Volunteer Costs	161	163	164	488
Refreshments, session materials, trips	1,411	1,425	1439	4275
Transport: minibus and taxis	4,791	4,839	4887	14517
Building Costs	1707	1724	1741	5172
Office, admin and finance costs	918	927	936	2781
Organisational management and governance	4197	4239	4281	12717
<b>TOTAL</b>	<b>33030</b>	<b>32906</b>	<b>33235</b>	<b>99171</b>

What income has already been raised?

(List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
<b>TOTAL</b>				

What other funders are currently considering the proposal?

None

**19. Funding requested from the Trust**

How much is requested from the Trust? (List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Project manager /session lead	7869	7493	7568	22930
Sessional staff	11429	11543	11659	34631
Staff training & travel	547	552	558	1657
Volunteer Costs	161	163	164	488
Refreshments, session materials, trips	1411	1425	1439	4275
Transport: minibus and taxis	4791	4839	4887	14517
Building Costs	1707	1724	1741	5172
Office, admin and finance costs	918	927	936	2782
Organisational management and governance	4197	4239	4281	12717
<b>TOTAL</b>	<b>33030</b>	<b>32906</b>	<b>33235</b>	<b>99171</b>

**ASSESSMENT CATEGORY - Accessible London - Arts & Sports**

**Misgav**

**Ref: 11473**

**Amount requested: £56,499**

**Adv: Joan Millbank**

**Base: Hackney**

**Benefit: Hackney,  
Haringey & Barnet**

**Purpose of grant request:** Salaries for an Activity Coordinator and Finance Officer, enabling Misgav to develop its capacity in delivering a range of arts and sports activities to learning disabled women.

**Background**

Misgav was set up in 2006 to improve the lives of young women from the Charedi (Orthodox Jewish) community in Hackney and Haringey with a range of disabilities. Population profiles show that there are 20,000 Orthodox Jews living in Hackney and Haringey; an estimated 320 are adults with a learning disability. It is well known that people with learning disabilities (PwLDs) are often excluded from mainstream sports and leisure activities; young Jewish women experience further exclusion because of cultural and religious requirements. Also PwLDs tend to have a sedentary lifestyle. Lack of exercise and the effects of medication put their health and wellbeing further at risk. Misgav works to fill the gap by providing a range of accessible arts and sports activities in a women-only setting. Sports activities include wheelchair netball, partnered cycling, swimming and gym work, while arts activities include crafts, film making, music making. Activity day trips are provided within and outside London. An annual residential provides an adventure holiday for the young disabled women and a respite break for their parent/carers.

**Funding History**

None

**Current Application**

The applicant is seeking support to meet the cost of the Activity Coordinator (20 hours per week) and the Finance Officer (15 hours per week). A grant will secure these posts for three years and by doing so enhance the capacity of Misgav to expand its 'offer' while building its longer term sustainability as a specialist disabled women's sports and arts organisation.

At least 14 hours of sports and arts activities will be provided each week, on Monday, Tuesday and Wednesday evenings, and on Sundays. Activities will be sports and arts based, delivered through small groups and on a one-to-one basis to meet the particular needs and interest of each young

woman. Each year, a minimum of 16 young women with mild, moderate and severe learning disabilities will benefit; most also have physical disabilities and experience social isolation.

A small part-time staff team will organise and run the activities alongside specialist trainers as required. A pool of 80 trained volunteers will help reduce participation costs by providing one-to-one support and other support services e.g. drivers. In 2012 volunteers donated approx. 4713 hours of support. Premises costs may seem high but these include the hire of gyms, swimming pools and cycle tracks to provide women-only sessions.

### **Financial Observations**

The audited accounts for the year ending 31<sup>st</sup> March 2012 show income of £96,002 and an end-of-year surplus of £8,571 (8.9% turnover). The reserves policy states that the organisation aims to hold free unrestricted reserves of between six to twelve months' worth of running costs, which equates to £44,000 to £88,000 in the year. At 31<sup>st</sup> March 2012 free unrestricted reserves stood at £46,534, which is on target.

The revised budget for 2012-13 shows £85,498 secured income, and a projected end-of-year surplus of £818. The 2013-14 budget shows projected expenditure of £105,847 against projected income of £106,868, of which £80,870 has been secured to date.

### **Officer's Appraisal**

Misgav is a charitable trust. Users' views inform wider organisation planning and activities are designed and delivered with full regard to each user's interests and ability. The organisation is linked into local disability networks, takes referrals from Step by Step, the Jewish children's charity and receives organisation development support from Interlink, the Jewish infrastructure organisation. Volunteer involvement is impressive.

This proposal offers you an opportunity to assist disabled young Jewish women to undertake sports and arts activity. Most users will not be eligible for personal budgets despite their disabilities and social need. By offering a specific service Misgav is opening up opportunities and removing barriers to participation, while addressing specific cultural parameters for a particular marginalised group of Londoners. This application fits your grant criteria.

### **Recommendation**

**£56,500 over three years (£18,200; £18,900; £19,400) towards the salary of a part-time Activity Coordinator and part-time Finance Officer for a dedicated sports and arts disability project and on the condition that the Trust is not the largest revenue funder in years 2 and 3.**



# The City Bridge Trust

Charity Registration Number: 1035628

## Working with Londoners: Application for a grant

Please read the guidance notes before completing this form

Reference:  
(office use only)

11473

Date Received:

09/11/12

Programme  
Area:

1

### 1. About your organisation

Name of organisation applying for grant: <b>Misgav</b>	
If the organisation is part of a larger organisation, what is its name? <b>N/A</b>	
Address for correspondence <b>London</b>	
Postcode: <b>N16</b> Is this your home address? <b>Yes</b>	
Contact person: <b>Mrs Sarah Schmerler</b>	Position: <b>Director of Services</b>
Phone: <b>020 7998</b>	Fax:
E-mail: <b>sschmerler@misgav.org.uk</b>	
Website:	
Legal status of organisation: <b>Registered Charity</b>	
If registered, please give charity number: <b>1125362</b>	
Year and month organisation established: <b>February 2006</b>	

### 2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? <b>Accessible arts and sports</b>
Purpose for which funds are requested: (25 words maximum) <b>Salaries for a Activity Coordinator and Finance Officer, enabling Misgav to develop its capacity in delivering a range of arts and sports activities to learning disabled adults</b>
How much funding is requested? <b>Year 1: £18,172 Year 2: £18923 Year 3: £19404</b> <b>Total: £56499</b>



### 3. Aims of your organisation

The aims of Misgav are to improve the quality of life of women (aged 13-40) with physical, emotional or learning disabilities (incl Down Syndrome, Autism, Cerebral Palsy and a range of mild-severe learning difficulties), by providing educational and sports activities. The aim of these activities is to enhance their lives by improving their health, learning new skills and improving access to sports and arts programmes they would otherwise lack because of their exclusion from mainstream programmes. Most of our users are from the local Orthodox Jewish (OJ) community although we welcome any disabled women who wishes to join. Our users face exclusions as a result of their disabilities as well as their cultural needs of separate gender and culturally appropriate activities. We aim to give the disabled participants life and other skills so that they can reach their personal potential, and be integrated into mainstream society. We also aim to support their parents/carers in their caring role by giving them opportunities for respite so that they can recharge their batteries

### 4. Main activities of your organisation

The main activities of Misgav consist of an extensive programme of out of hours activities for women with physical and learning disabilities. We organise activities on five days for a total of fourteen hours each week. The women have the decisive say in what they do, and the activities they have chosen consist of: 1) aerobics, swimming and music for 6 hours on Sundays 2) A daily, 2-hour evening program of netball (certainly the most popular activity of the week!) gardening, food and nutrition (which includes cooking a weekly dinner), and model making. This totals an eight hour program running on Mondays, Tuesdays, Wednesdays and Saturdays.

We also run a week-long annual winter residential for our users where we provide a range of sports, arts and social activities, and visits to local places of interest.

All these activities are run by a combination of paid and volunteer workers, with co-ordination and administration being done by paid workers, supplemented by volunteers.

### 5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
0	14	3	80

### 6. How do you support your volunteers?

By providing them with induction and regular training as well as supervision every 3 months at which any issues that they might have can be raised. We also hold annual appraisals and regular staff meetings, and a celebratory bi-annual event.

### 7. Property occupied by your organisation

Is the main property owned or leased/rented by your organisation?	If leased/rented, how long is the outstanding lease/rental agreement?
Rented	1 year & option to extend

## 8. Finance

From your most recent audited or independently examined accounts, complete the following:

Financial year ended -

Month: **March**

Year: **2012**

<b>Income received from:</b>	<b>£</b>
Voluntary income	40,046
Activities for generating funds	0
Investment income	0
Income from charitable activities	49,103
Other sources	6,853
<b>Total Income</b>	<b>96,002</b>

<b>Expenditure:</b>	<b>£</b>
Charitable activities	86,321
Governance costs	400
Cost of generating funds	710
Other	0
<b>Total Expenditure</b>	<b>87,431</b>
<b>(Deficit)/surplus for the year:</b>	<b>8,571</b>

<b>Asset position at year end</b>	<b>£</b>
Fixed assets	3,268
Investments	0
Net current assets	46,534
Long-term liabilities	0
<b>*Total A</b>	<b>49,802</b>

<b>Reserves at year end</b>	<b>£</b>
Endowment funds	0
Restricted funds	0
Unrestricted funds	49,802
<b>*Total B</b>	<b>49,802</b>

\* Total A and Total B must be the same and should be taken from your balance sheet

## 9. Statutory funding

For the financial year above, what % of your income was from statutory sources?  
7.14%

## 10. Material changes

Describe any material changes to the organisation's activities, structure or financial position since the date of the most recent accounts:

None

## 11. Previous applications to the Trust

Have you applied to the Trust before? If so, please give details:					<input checked="" type="checkbox"/>
Month/Year: -	/ -	Ref:	Grant received: £	OR application rejected	<input type="checkbox"/>
Month/Year: -	/ -	Ref:	Grant received: £	OR application rejected	<input type="checkbox"/>
Month/Year: -	/ -	Ref:	Grant received: £	OR application rejected	<input type="checkbox"/>

## 12. Previous funding received

Funding received by your organisation from the following sources during the last **THREE** years:  
**(i)** City of London (other than the City Bridge Trust) **(ii)** London boroughs **(iii)** London Councils (formerly ALG)  
**(iv)** Health authorities **(v)** Central government departments **(vi)** Other statutory bodies (e.g. Housing Corporation, Arts Council) - List source, years and annual amounts:

	Year: 2009	Year: 2010	Year: 2011
(i)			
(ii) Youth Opportunity Fund		5084	
(iii) Hackney & Haringey	2500	23699	35800
(iv)			
(v)			
(vi)			

## 13. Previous grants received

Grants received by your organisation from charitable trusts and foundations (other than the City Bridge Trust) during the last **TWO** years. List source, years and annual amounts:

	Year: 2010	Year: 2011
Awards For All		10000
British Heart Foundation		2000
BT Community Connections		170
Capital Growth		1000
East London Business Alliance		1682
ELCF Grassroots	2750	2250

## 14. What steps is your organisation taking to reduce its carbon footprint?

Misgav is very aware of the importance of conserving the planet and reducing its carbon footprint. To this end, we reduce the use of paper as much as is feasible and communicate by email wherever possible. We also use natural light and ventilation as much as we can, and keep the temperature of our offices as low as is still comfortable in the colder seasons. We make sure that all equipment is turned off out of hours, when it is safe to do so, including lighting and heating, and we use low energy light bulbs. Our staff walk to work, and our users walk to activities wherever possible. We educate them in the importance of reducing our carbon footprint, and do not use disposables either in the office or in our activities where feasible and practical. We recycle paper, our ink cartridges, and any other possible materials.

## 15. Purpose

Complete this section whatever the amount of grant requested. **In addition**, if the request is for £25,000 or more in total, a fuller proposal should be sent with this form. Also, if your application is for all or part of new or existing post(s), please enclose a copy of the relevant job description(s) including the salary level.

**In order to provide the right information, please refer to guidance note 15 before completing this section.**

**The Need:** Hackney and Haringey have a OJ population of 18-20,000 (Mayhew, Estimating and Profiling the Population of Hackney), 8% of the total population growing at a rate of 5-6% each year. There are an estimated 4000 adults with learning disabilities in Hackney (Hackney Joint Strategic Needs Assessment) which extrapolates into 320 adult OJ with learning disabilities. These statistics and our own research confirm that there is a great need for an out of hours programme for women with learning disabilities enabling them to access sporting and arts activities. The women we target live at home; some attend a day centre learning life skills/independence, with a few hours a week work experience. Some of our users are at home all day with little to occupy them; several attend mainstream schools. The common denominators are a lack of general out of hours activities as well as a particular lack of access to arts and sporting activities. This is a result of a number of factors. Firstly, being women with disabilities excludes them from mainstream activities as they need high levels of supervision and activities appropriate to their abilities. Secondly, they belong to an ethnic minority with its own very specific cultural and religious requirements including separate gender and culturally sensitive activities which make many mainstream activities inappropriate for them. And thirdly, they are on low income with little resources to be able to finance their own leisure time activities. These findings were revealed by running a focus group, by distributing questionnaires to potential and current users and their families, and through our work with women with disabilities over the last 6 years. There are no groups locally apart from ours, providing out of hours activities to this client group, or any significant sports and arts activities to them, even during day hours.

**The Project:** We are planning an out of hours programme of sporting and art activities on Sundays, and weekday evenings totalling 14 hours weekly for 14-16 young women with learning disabilities. The sport programme will consist of netball, aerobics and swimming, and the arts activities will be model making and music, possibly finetuned as a result of input from our users. We are asking The City Bridge Trust to finance the salaries of a Project Manager and a Finance Officer so that Misgav can increase its capacity and develop its programmes further to fill the ever increasing need as the population grows. Activities will be run by trainers assisted by volunteer youth workers.

**Outcomes:** The outcomes we are planning to achieve are:

1. 14-16 young women with learning disabilities will have access to new opportunities in the arts and in sports.
2. 14-16 young women with learning disabilities will report improved physical and mental wellbeing.
3. 14-16 young women with learning disabilities will develop improved skills and enjoyment in sports and in practical arts activities.

**The Right Organisation:** Misgav, a grassroots organisation that has been the sole provider in the community for out of hours activities for young women with disabilities since 2006, has developed the skills, the knowledge, the reputation and the networks to make it the ideal organisation to deliver the work we have described.

**Meeting the Trust's Theme:** This project meets the Trust's theme of enabling disabled people to lead lives that are more independent and fulfilling, by improving access to arts and sporting opportunities. This planned project will help our disabled users to participate more fully in society as they will acquire new skills and interests that can be developed further. The activities will also give them new friends, very often a particular problem for disabled people, they are often very lonely. It will also give them a range of interesting and enjoyable arts and sporting activities to fill their leisure hours, which would otherwise be arid and boring. The project will give them access to a world of interest, of opportunity and of fun, in the company of their contemporaries.

**Good practice:** Our users are involved in every aspect of the planning of the project, including recruitment and activities, as well as organising programmes and activities. They will also decide on which activities should take place and when. We and they value diversity, and will welcome people of all backgrounds, countries of origin and ability or disability, so long as this is an appropriate project for them. We have a large group of volunteer support workers for this project, and we support them in the ways we described in Q6. We, our staff and volunteers and our users are reducing our carbon footprint as we described in Q14.

**16. Explain how you will monitor and evaluate both your own outcomes and those of the programme under which you are applying.**

We will keep a register of all attendees at each activity. We will issue questionnaires to each user at the end of each term which our volunteers will help them complete if they are unable to complete them independently themselves. The questionnaires will have before and after questions relating to our outcomes and to the outcomes of the programme. Target sheets will be completed for each participant at the start of each term where the previous terms' progress will be carefully monitored and future targets set. Each trainer will need to complete an assessment on each user every half year in which she will be asked to record how far she feels the user has advanced to the planned outcomes, both ours and those of the programme. The results of these reports will be evaluated, results recorded and progress reports compiled. These results will show clearly how far the project has gone towards achieving its planned outcomes and the project will be finetuned according to evaluations of the progress reports.

**17. Beneficiaries**

How many people will benefit from the grant per year? <b>16 young and older adults with disabilities + their family members/carers</b>			
In which local authority is your organisation based? <b>London Borough of Hackney</b>			
Which borough(s) of Greater London will benefit from this grant? (if more than one, please give % for each) <b>Hackney 85% , Haringey 10%, Barnet 5%</b>			
At what address will the activity be located? <b>85b Lordship Rd N16, Gladesmore Leisure centre, East-London Reservoir</b>			
What age group will benefit? <b>15-40</b>			
What will the ethnic grouping(s) of the beneficiaries be?			
	<b>%</b>		<b>%</b>
White - British	<b>10</b>	Black - Caribbean	
White - Irish		Black - African	
White - Other (please describe)		Black - Other (please describe)	
Asian - Indian		Black - British	
Asian - Pakistani		Chinese	
Asian - Bangladeshi			
Asian - Other (please describe)		Other (please describe) <b>OJ</b>	<b>90</b>
Open to everyone			
What proportion of the beneficiaries will be disabled people? <b>100%</b>			

## 18. Funding required for the project

What is the total cost of the proposed activity/project?

(List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Activity Coordinator salary	12480	12854	13240	<b>38574</b>
Employers NI	689	741	794	<b>2224</b>
Finance Officer salary	7800	8034	8275	<b>24109</b>
Employers NI	43	44	45	<b>132</b>
<b>TOTAL</b>	<b>21012</b>	<b>21673</b>	<b>22354</b>	<b>65039</b>

What income has already been raised?

(List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
Awards For All (Activity Coordinator)	1640			
<b>TOTAL</b>				

What other funders are currently considering the proposal?

**We have submitted an application to the Hackney council Grants program for £1200 for Activity Coordinator, part of £25000 (Year 1). We will apply again for Year 2 and Year 3 Activity Coordinator; £2750 in Year 2 and £2950 in Year 3.**

## 19. Funding requested from the Trust

How much is requested from the Trust? (List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Activity Coordinator salary	9640	10104	10290	<b>30034</b>
Employers NI	689	741	794	<b>2224</b>
Finance Officer salary	7800	8034	8275	<b>24109</b>
Employers NI	43	44	45	<b>132</b>
<b>TOTAL</b>	<b>18172</b>	<b>18923</b>	<b>19404</b>	<b>56499</b>

## 20. Funding requested from the Trust (continued)

When will the funding be required? **March 2013**

Is the activity to continue beyond the period for which funding is requested?

If so, how will it be resourced? **Three year funding for an Activity Coordinator and a Finance Officer will give Misgav a window of opportunity to develop a fundraising programme. Volunteer time which has till now been spent on running the organisation will be freed up to develop a data base of loyal funders which will set the organisation on the road to long term sustainability.**

If any planning or other statutory consents are required for the project to proceed, what stage have the applications reached? **N/A**

### Declaration on behalf of applicant organisation

I, **Sarah Schmerler** (your name)

am an authorised representative of

**Misgav** (your organisation)

within which I am **Director of Services** (your position)

**To the best of my knowledge, all the information that I have provided in this application form is correct**

Signature

*S. Schmerler*

Date *07/11/12*

**Return the completed form to: The City Bridge Trust**

City of London

PO Box 270

Guildhall

London EC2P 2EJ

Please

- **do not send this application by fax or e-mail** – unless applying online, applications must be posted to the Trust
- **do send the information in the checklist** – if items are missing, your application will be returned to you
- **do send only the information in the checklist** – if further information is required, we will contact you
- **do ensure you have signed and dated this form** – we cannot accept forms which have not been signed and dated
- **do use the correct postage** – the completed form and additional materials are likely to exceed 100g in weight

**ASSESSMENT CATEGORY - Bridging Communities**

**Merton Home Tutoring Service**

**Ref: 11288**

**Amount requested: £36,562**

**Adv: John Merivale**

**Base: Merton**

**Benefit: Merton**

**Purpose of grant request:** 3 'Stepping Stone' (Basic English/ESOL) classes for migrants/refugees by volunteer qualified teachers and our home tutoring service - English to adults unable to access other classes.

**Background**

Merton Home Tutoring Service (MHTS) is a relatively new organisation established in 2009. It arose through the Founder's experience as a volunteer with Merton Asylum Welcome. She encountered a large unmet need for English language education which would suit older people, those caring for young children, those unable to pay, or those who have been so damaged by trauma as not to be able to venture outdoors. Backgrounds are as diverse as South American, Somali, other African states, Balkan or Palestinian. Many are highly educated, while others may not be equipped for academic exams. Statutory provision of English as a Second Language (ESOL) teaching tends to be for younger ages and examination based and employment focused.

The founder is a retired academic, who has been running the organisation entirely on a voluntary basis, while sufficient funding was awarded by Trust for London to pay a part-time Co-ordinator. Local charity the Wimbledon Guild has lent support in the form of free office and training space. Trustees include a former teacher, fellow trustees from the Asylum Welcome, a Solicitor, and a retired accountant as Treasurer.

**Funding History**

None.

**Current Application**

The request is for a contribution to salary and running costs for 'Stepping Stones', a programme of three classes, rising to four in years 2 and 3. MHTS provides English teaching in private homes (where necessary for pupils unable to get out), community halls, housing associations, and in a Women's Refuge from domestic violence and trafficking. All such situations are properly risk-assessed. The classes you are asked to support are in public venues. The co-ordinator is herself a qualified and experienced ESOL teacher, while the organisation uses a team of qualified volunteer teachers who are carefully trained for these specific circumstances - a pool of such is available owing to recent cuts in public provision. The aim is always to move people on to further English courses, to taking part in the public world, and to gradual assimilation in



mainstream society. There is also a drop-in service one day/week for practical support. The programme has been revised slightly in the period since original application. The request is now for three years from this month, and a revised table of costs is shown as Appendix A.

### **Financial Observations**

MHTS depends on scant funding, and good will, but has received grants from Trust for London, Awards for All, and Merton Priory Housing Association. It became a registered charity in November 2010, and the year to 31<sup>st</sup> March 2012 is the first year in which its income has exceeded the £25,000 threshold at which the Charity Commission demands independently examined accounts. These accounts record income of £33,134 and an overall surplus of £12,700. This comprised a surplus of £10,987 on restricted funds and £1,713 on unrestricted activity. MHTS aims to build unrestricted free reserves equivalent to six months' running costs, which equates to £13,950 based on forecast expenditure in 2013/14. As at 31<sup>st</sup> March 2012, the charity held only £3,760 in unrestricted free reserves, equating to 1.6 months' worth.

For the current year to 31<sup>st</sup> March 2013, the charity forecasts income of £23,435 and, after expenditure of £24,295, a deficit of £860. It is planned to fund this from unrestricted reserves, thereby reducing them to £2,900 – which equates to 1.2 months' worth of expenditure and clearly below the reserves policy target to hold 6 months' worth at £13,950.

For the year 2013-14, MHTS plans expenditure of £34,975. Of this, £19,250 (55%) has been secured at the time of writing, while the balance of £15,725 has been applied for from various sources, including this request for £8,650. The charity recognises that this situation needs to be carefully managed and aims to keep costs to an absolute minimum: committed expenditure amounts to £27,900 (for room rental and the salary of the co-ordinator) with the balance of £7,075 subject to funding being secured. Meanwhile, the actual classes are maintained by the volunteers. Nevertheless, it is recommended that any grant be subject to a satisfactory update of the outturn for 2012-13 and budget for 2013-14.

### **Officer's Appraisal**

The organisation shows an imaginative and very professional response to a real need, in straitened economic times. The use of committed volunteers, to teach a number now amounting to almost 100 people, results in exceptional value for money; while the social benefits are clearly offered with great sensitivity.

### **Recommendation**

**£34,120 over three years (£8,650; £12,490; £12,980) to provide basic English classes for migrants, refugees and other adults unable to reach other classes. The grant is conditional on a satisfactory update of the outturn for 2012-13 and budget for 2013-14.**



# The City Bridge Trust

Charity Registration Number: 1035628

## Working with Londoners: Application for a grant

Please read the guidance notes before completing this form

Reference:  
(office use only)

11288

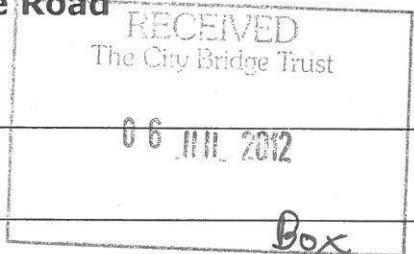
Date Received:

6 July 2012

Programme  
Area: 2

### 1. About your organisation

Name of organisation applying for grant: <b>Merton Home Tutoring Service</b>	
If the organisation is part of a larger organisation, what is its name? <b>No</b>	
Address for correspondence <b>c/o Wimbledon Guild, Guild House, 30/32 Worple Road</b>	
Postcode: <b>SW19 4EF</b> Is this your home address? <b>No</b>	
Contact person: <b>Dr Ruth Dawson</b>	Position: <b>Manager &amp; Trustee</b>
Phone: <b>020 8946 4476</b>	Fax:
E-mail: <b>mertonhometutoring@gmail.com</b>	
Website: <b>Merton Home Tutoring Service</b>	
Legal status of organisation: <b>Registered Charity</b>	
If registered, please give charity number: <b>1139126</b>	
Year and month organisation established: <b>2009 January</b>	



### 2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? <b>Bridging communities</b>
Purpose for which funds are requested: (25 words maximum) <b>3'Stepping Stone' [basic English/ESOL] classes for migrants/refugees by volunteer qualified teachers and our home tutoring service - English to adults unable to access other classes.</b>
How much funding is requested? <b>Year 1: £9,582 Year 2: £13,259 Year 3: £13,921</b> <b>Total: £36,562</b>

### 3. Aims of your organisation

From our Constitution

- To advance the education of adults living in the London Borough of Merton, for whom English is a second language and for whom it is difficult to attend formal classes, by the provision of English language tuition in their homes[and elsewhere].
- Such other charitable purposes as the Trustees shall from time to time determine. [i.e. last year, the Trustees determined that:-
  - a. 'Stepping Stone' classes should be set up to enable learners to progress via this medium to attending formal courses at local colleges, to become active & integrated citizens and to obtain employment where this is possible.
  - b. the Service signposts learners to a wide variety of relevant information & advice, by various means, including the provision of specialist information booklets developed by our Service].

### 4. Main activities of your organisation

- We offer English tuition to any migrant or refugee. We recruit volunteer tutors & teachers from our local community.
- Continuous referrals enable us to carry out assessments of students in their homes for home learning or for classes. We introduce tutors to learners in their own homes; bespoke tuition, free of charge, is arranged, on a one-to-one basis for the learners who are unable to access classes;
  - We train all tutors, including induction training for our qualified volunteer teachers, & carry out follow-up reviews to monitor progress & evaluate our Service.
  - We have a weekly drop in/advisory session, with access to resources, to support tutors and teachers.
  - We have introduced local 'Stepping Stone' classes for adult learners ready to move on from home tutoring & also for others unable to attend mixed classes; not ready/ willing /able/cannot afford to attend formal exam classes, or for whom, currently, few classes at beginner level exist locally. We design & develop learning materials, e.g. booklets for adults at an early stage of English learning, which also provide information on everyday life in UK.

### 5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
0	1	10	40

### 6. How do you support your volunteers?

Volunteers are provided with support & advice on a continuous basis i.e. regular tutor & class supervision; ongoing update training sessions, provision of teaching materials/ equipment/photocopying; insurance & travel expenses.

### 7. Property occupied by your organisation

Is the main property owned or leased/rented by your organisation?	If leased/rented, how long is the outstanding lease/rental agreement?
No. Rent free space.	Hopefully ongoing.

## 8. Finance

From your most recent audited or independently examined accounts, complete the following:

Financial year ended -

Month: **March**

Year: **2012**

<b>Income received from:</b>	<b>£</b>
Voluntary income	1,745
Activities for generating funds	957
Investment income	
Income from charitable activities	30,432
Other sources	
<b>Total Income</b>	<b>33,134</b>

<b>Expenditure:</b>	<b>£</b>
Charitable activities	18,923
Governance costs	107
Cost of generating funds	480
Other	924
<b>Total Expenditure</b>	<b>20,434</b>
<b>(Deficit)/surplus for the year:</b>	<b>12,700</b>

<b>Asset position at year end</b>	<b>£</b>
Fixed assets	
Investments	
Net current assets	14,747
Long-term liabilities	
<b>*Total A</b>	<b>14,747</b>

<b>Reserves at year end</b>	<b>£</b>
Endowment funds	
Restricted funds	10,987
Unrestricted funds	3,760
<b>*Total B</b>	<b>14,747</b>

\* Total A and Total B must be the same and should be taken from your balance sheet

## 9. Statutory funding

For the financial year above, what % of your income was from statutory sources?  
None

## 10. Material changes

Describe any material changes to the organisation's activities, structure or financial position since the date of the most recent accounts:

The robustness of our service, commitment of volunteers, staff and Trustees remain the same. Our successful 'Stepping Stones'/ESOL classes, funded by awards for All until November 2012, need to continue. Increased demand for our services, class & material development & evaluation necessitates additional supervision time 7 Co-ordinator input.

## 11. Previous applications to the Trust

Have you applied to the Trust before? If so, please give details:						<input checked="" type="checkbox"/>
Month/Year: -	/ -	Ref:	Grant received: £	OR application rejected		<input type="checkbox"/>
Month/Year: -	/ -	Ref:	Grant received: £	OR application rejected		<input type="checkbox"/>
Month/Year: -	/ -	Ref:	Grant received: £	OR application rejected		<input type="checkbox"/>

## 12. Previous funding received

Funding received by your organisation from the following sources during the last **THREE** years:  
**(i)** City of London (other than the City Bridge Trust) **(ii)** London boroughs **(iii)** London Councils (formerly ALG)  
**(iv)** Health authorities **(v)** Central government departments **(vi)** Other statutory bodies (e.g. Housing Corporation, Arts Council) - List source, years and annual amounts:

	Year: <del>2008</del> <sup>09</sup>	Year: <del>2009</del> <sup>10</sup>	Year: <del>2010</del> <sup>11</sup>
(i) Merton Small Grants [MVSC]	194		
(ii) LBM Regeneration, Investment &			
(iii) Renewal Annual Grant programme			
(iv) 2011-12			5425
(v)			
(vi)			

## 13. Previous grants received

Grants received by your organisation from charitable trusts and foundations (other than the City Bridge Trust) during the last **TWO** years. List source, years and annual amounts:

	Year: <del>2009</del> <sup>10</sup>	Year: <del>2010</del> <sup>11</sup>
Thames Community Foundation Grassr Awards for All	2555	2910
Trust for London 2010-'11 for		9392
Co-ordinators' salary 14hrsx36wks		12,705

## 14. What steps is your organisation taking to reduce its carbon footprint?

A. THROUGH THE USE OF PUBLIC TRANSPORT  
 Where our assessment visits are to homes easily accessible on foot, by bus, tram, train or tube, we deliberately choose to use them.

B. THROUGH SHARING ACCOMMODATION AND HOTDESKING  
 We thus use space efficiently.

C. THROUGH LIMITING PURCHASES OF BOOKS  
 We provide borrowable wallets of photocopied material, to lessen the need to photocopy. Our resource lending library reduces the number of books people need to purchase.

D. THE PROVISION OF UNPROCESSED FOOD AT TRAINING SESSIONS.  
 We select, as far as possible, refreshments that have undergone minimal industrial food processing; i.e we provide fresh fruit and vegetables rather than biscuits, cakes, and other heavily processed food.

E. RE-USE OF ONE SIDED PAPER.  
 We double side paper where possible, and print for unofficial use the unused side of paper we receive

## 15. Purpose

Complete this section whatever the amount of grant requested. **In addition**, if the request is for £25,000 or more in total, a fuller proposal should be sent with this form. Also, if your application is for all or part of new or existing post(s), please enclose a copy of the relevant job description(s) including the salary level.

**In order to provide the right information, please refer to guidance note 15 before completing this section.**

- THE NEED FOR OUR SERVICE is substantial and growing, evidenced by Merton being a multi ethnic & multi lingual borough, with school statistics showing 50% ethnic minority children & 160 languages spoken. Experience from talking to 'Merton Asylum Welcome' clients, long waiting lists for English classes, 100 each at 3 Merton Childrens' Centres, overwhelming referral numbers, show adult migrants with an unmet need for English tuition. Inability to access English classes results in community isolation & not integration. Reasons may include disability, inability to pay for registration/crèche facilities, difficulty in negotiating public transport with children, husbands refusing permission, work that prevents attendance, rigidity of college starting times, insufficient classes, illiteracy and ignorance of adult education in the UK.
- DELIVERY OF WORK. A substantial amount of our tuition is home-based but accommodation has to be sought and funded for our 'Stepping Stones'/ESOL classes. We have suitable premises at present and, with funding, these will continue from January 2013. We have agreement from three qualified volunteer teachers to teach the classes. The Wimbledon Guild has agreed to provide a training room when needed, house our teaching resources & provide one day a week office space. At present we have trained volunteers, a volunteer Manager and a part time salaried Co-ordinator.
- THREE CLEAR OBJECTIVES OF OUR SERVICE ARE
  1. We enable adult migrants and refugees, who are in great need, to learn English.  
Outputs of adults taught English:3 classes [34 adults], home learners [35].  
Outcomes: Increased knowledge of English enabling 15 learners to apply for college places next September 2012; out of 10 illiterate learners, 2 are now literate & 8 progressing well; with improved English, at least 10 adults have secured part-time jobs. Individual confidence has increased, evidenced by feedback e.g 'My mother is much more confident now.' 'H is so kind, teaching my wife English for the hospital appointment, for her baby.'
  2. We give excellent training and support for volunteers.  
Output: 3 x 18 hour training courses annually, 42 advisory sessions, 5 update meetings, 4 induction courses and 3 staff meetings for class teachers. National Association for Voluntary Teachers of English founded & operating.  
Outcomes: effective and respected tutors: Ashanti Asian Womens' Refuge reported: 'Your tutors have enabled women to make considerable progress in self confidence & the ability to act independently- 4 have gained work, 4 passed exams in English, driving & food hygiene.'
  3. Progress in knowing how things work in the UK, leading to understanding & community participation.  
Outputs: Learning materials & information booklets in basic English, plus learning from tutors.  
Outcomes: Learners better informed, able to access to services - 'My mother can now ring the gas suppliers.' Tutors report: 'M rang the doctor by herself' 'R goes to a Mother & Toddler group now.' 'N and I astonish each other: she has taught me such a lot about Afghani society, and I her about Britain.'
- THE RIGHT ORGANISATION. We have considerable & relevant experience already: we attract highly educated volunteers, multicultural with excellent English; we provide a well regarded training course. The Trustee Board include a lawyer, 2 chartered accountants, 1 project manager, 1 business woman, 2 ESOL teachers, a refugee group leader. The Manager & Co-ordinator are experienced ESOL teachers, the former experienced in school inspection & both in home tutor training & programme management of refugees, with a PhD in training evaluation.
- BRIDGING COMMUNITIES is the result of what we do and was inherent in our philosophy from the start. Home tutoring & our classes have resulted in isolated adults with no English, and lacking in confidence, enabled to get into educational establishments, find work and begin to participate in mainstream activities. Learning is reciprocal for tutors and learners.
- GOOD PRACTICE: 3 volunteers have joined our Trustees; all referrals assessed; a learner employed to set up library shelving; placement provided for a learner's daughter to gain experience in admin.
- APPLICATION FOR EXISTING POST EXTENSION ENCLOSED

**16. Explain how you will monitor and evaluate both your own outcomes and those of the programme under which you are applying.**

- Initial assessment of students measures students' English language levels. Learning goals are agreed by tutors & teachers. Review visits & staff feedback are compared to initial assessments to show the progress in English, further study requirements, employment prospects etc.,
- Tutors' 'Records of teaching' are sent at 2 monthly intervals to the Co-ordinator for analysis.
- Evaluation evidence is obtained through Manager's termly visits to classes, termly staff meetings and reports/comments from volunteers & update meetings. Phone calls & emails are noted.
- Tutor Course evaluation sheets are used to develop & enhance Tutor Training.
- Tutors, teachers and learners agree 3 learning goals which the Co-ordinator assesses on visits to tutors and learners at home after 6 months of classes.
- Up date meetings & advisory sessions facilitate tutor feedback.
- Learners' comments, formal and informal, are retained in our evaluation file for reference.
- Questionnaires for learners on their experience of our Service have now been developed.

**17. Beneficiaries**

How many people will benefit from the grant per year? **30 in classes, 8 in a conversation class and 36 home tuition:74**

In which local authority is your organisation based?  
**London Borough of Merton: all figures Q.17 based on current figures.**

Which borough(s) of Greater London will benefit from this grant?  
(if more than one, please give % for each)  
**85% Merton, rest from Wandsworth & Sutton**

At what address will the activity be located? **Homes, family centres, church hall, library in Merton borough.**

What age group will benefit? **20-60**

What will the ethnic grouping(s) of the beneficiaries be?

	%		%
White - British		Black - Caribbean	
White - Irish		Black - African	<b>8</b>
White - Other (please describe) <b>Polish, Ukraine, Russ</b>	<b>16</b>	Black - Other (please describe)	
Asian - Indian	<b>8</b>	Black - British	
Asian - Pakistani	<b>14</b>	Chinese	
Asian - Bangladeshi	<b>3</b>		
Asian - Other (please describe) <b>Sri Lanka, Afghan, Mauriti</b>	<b>38</b>	Other (please describe) <b>Middle East, South Americ</b>	<b>13</b>

Open to everyone

What proportion of the beneficiaries will be disabled people?  
**5%**

## 18. Funding required for the project

Superseded - see Appendix

What is the total cost of the proposed activity/project?

(List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
9 Terms Autumn 2012 - Summer 2015				
Class A: rental	1,080	1,080	1,080	3,240
Class B: rental	1,080	1,080	1,080	3,240
Class C: rental & creche	5,896	5,896	5,896	17,688
Class D: Free rental	0	0	0	0
AGM & Annual report	200	200	200	600
Office, training room & photocopying	0	0	0	0
Phone Bill	510	510	510	1,530
Volunteer expenses	270	100	100	300
Co-ordinator: 3 hrs x 36 wks x £23	2,484	2,484	2,484	7,452
Admin: 4hrs x 9.85 x 36 weeks	1,418.4	1,418.4	1,418.4	4,255.2
Totals without inflation	13,508.	13,508	13,508	40,525
Totals 5% inflation				
<b>TOTAL</b>	<b>13,508</b>	<b>14,183</b>	<b>14,892</b>	<b>£42,583</b>

What income has already been raised?

(List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
		0	0	
Awards for All: Year 1 Class C term 1	1,965	0	0	1965
-Year 1 Class A terms 1,2,3	1,080	0	0	1080
Merton Priory Homes Phone & AGM	570	0	0	570
<b>TOTAL</b>				<b>4115</b>

What other funders are currently considering the proposal?

**Deutsches Bank: Grant of £2, 400 to cover term Spring 2013 for class C**

## 19. Funding requested from the Trust

How much is requested from the Trust? (List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
9 Terms: Autumn 2012 - Summer 2015				
Class A: rental	0	1,080	1,080	2,160
Class B: rental	1,080	1,080	1,080	3,240
Class C: rental, creche Year 1 terms 2&3	3,930	5,896	5,896	15,722
Rental, creche Yrs 2,3				
Phone	200	200	200	600
Volunteer expenses	270	270	270	810
Salary: Co-ordinator 3hrs x 36 wks x £23	2,484	2,484	2,700	7452
Salary: Admin 4hrs x 36 x £9.85	1418	1,418	1,418	4,255
AGM & annual Report	200	200	200	600
	9582	12,627	12,627	£34,837
plus 5% to allow for inflation				
<b>TOTAL</b>	<b>9582</b>	<b>13,259</b>	<b>13,921</b>	<b>36,762</b>



## 20. Funding requested from the Trust (continued)

When will the funding be required? <b>October 2012</b>
Is the activity to continue beyond the period for which funding is requested? If so, how will it be resourced? <b>Yes, as long as it is needed. We hope to run at least one fundraising event annually, sell information booklets and apply to Trusts for the remainder.</b>
If any planning or other statutory consents are required for the project to proceed, what stage have the applications reached? <b>None</b>

### Declaration on behalf of applicant organisation

I, <b>Dr. Ruth Dawson</b> (your name)  am an authorised representative of <b>Merton Home Tutoring Service</b> (your organisation)  within which I am <b>Manager and Trustee</b> (your position)  <b>To the best of my knowledge, all the information that I have provided in this application form is correct</b>  Signature <i>Ruth Dawson</i> Date <i>3rd July 2012</i>
--

**Return the completed form to: The City Bridge Trust**  
City of London  
PO Box 270  
Guildhall  
London EC2P 2EJ

Please

- **do not send this application by fax or e-mail** – unless applying online, applications must be posted to the Trust
- **do send the information in the checklist** – if items are missing, your application will be returned to you
- **do send only the information in the checklist** – if further information is required, we will contact you
- **do ensure you have signed and dated this form** – we cannot accept forms which have not been signed and dated
- **do use the correct postage** – the completed form and additional materials are likely to exceed 100g in weight

ref: 11288

Appendix A:  
Revised request

Application to City Bridge Trust

Revised Question 18

Expected costs of MHTS (Core costs)

	Year to			
	31-Mar-14 £	31-Mar-15 £	31-Mar-16 £	
Class A	1,300	1,500	1,750	
Class B	750	1,000	1,200	
Class C	2,800	4,000	4,250	
Class D	100	1,000	1,200	
Class E (New class in 2015-16)	-	-	-	No charge for room in Year 1 If need, and funded
AGM and governance costs	200	250	300	
Training of tutors	2,375	3,000	3,500	
Books and teaching aids	-	600	750	£550 in 2014, if funded
CRB checks	250	400	500	
Conferences - training for staff/trustees		1,500	1,500	£1,500 in 2014, if funded
Insurance	450	500	550	
Staff costs	15,375	21,000	22,000	Additional staff £4,525 in 2014, if funded
Telephone	400	600	700	
Stationery	350	450	550	
Postages	250	350	450	
Events with learners	200	250	400	
Equipment		500	500	£500 in 2014, if funded
Commissioning booklets	2,400	1,000	2,500	
Sundries	100	150	200	
Volunteer expenses	600	600	700	
	<b>27,900</b>	<b>38,650</b>	<b>43,500</b>	

Budget for year to 31 March 2014 excludes projects/ costs of £7,075 which will only be incurred if funding is obtained. These costs are included in the 2015 and 2016 budgets

Revised Question 19

Funding Request

	Year to			
	31-Mar-14 £	31-Mar-15 £	31-Mar-16 £	
Class A - Acacia Room rental	1,300	1,500	1,750	Costs to July 2013 are prepaid
Class B - St Barnabas Replacement- Room Rental	750	1,000	1,200	Reduced rental costs in 2014
Class C- St Marks- Room Rental	2,800	4,000	4,000	Costs to July 2013 are partly prepaid
Class D- Garfield School- Room rental	100	1,100	1,100	No rental charge for first year - 2014
Tutor training costs	300			
Telephone and postage	100	-	-	
Volunteer expenses	350	350	350	
Salary - Coordinator/Admin help	2,750	3,750	3,750	
Cost of AGM and Annual Report	200	200	200	
	<b>8,650</b>	<b>11,900</b>	<b>12,350</b>	
Add increase in costs at 5%	-	595	625	
	<b>8,650</b>	<b>12,495</b>	<b>12,975</b>	
<b>Total over 3 years</b>	<b>£ 34,120</b>			

**ASSESSMENT CATEGORY - Bridging Communities**

**British Muslims for Secular Democracy**

**Ref: 11313**

**Amount requested: £45,000**

**Adv: Jenny Field**

**Base: Camden**

**Benefit: Tower Hamlets & London-wide**

**Purpose of grant request:** A contribution towards the Director's salary and overheads.

**Background**

British Muslims for Secular Democracy (BMSD) was established in 2006 both to oppose extremism in Muslim communities and to combat Islamophobia in the media and wider society. It encourages the civic engagement and responsible citizenship of Muslim communities in Britain and the building of shared values amongst all citizens to live in an inclusive, secular and democratic society. Its trustees include the journalist and commentator, Yasmin Alibhai-Brown.

BMSD works at the grass roots level and also contributes to the wider policy debate through the media, conferences and seminars. It works collaboratively with other relevant organisations, for example, it worked with the Citizenship Foundation (which you have supported previously) on an 18 month programme working with 16 - 21 year olds, mostly undergraduates, on their experiences as young Muslims living in Britain.

**Funding History**

None

**Current Application**

You are asked to contribute towards the Director's salary over the next three years and to the charity's general running costs. The Director is currently funded for 3 days a week (her hours were reduced from full-time in October 2012 due to lack of funds) but BMSD would like to make the post full-time and have resources for some administration support. This would enable the continuation and development of two projects that BMSD is currently involved with. It is working in partnership with Praxis (an organisation you have funded on several occasions) to deliver workshops in civic engagement which enable participants to better understand how to be active citizens. The workshops aim to raise awareness about secular democracy, encourage understanding and respect for different belief systems and to raise awareness about civil rights and the democratic process. To date, these have taken place in Tower Hamlets.

The second piece of work is its interfaith social action project. It has recently started to work with the Three Faiths Forum (which you are currently funding), the Islamic Society of Great Britain, City Sikhs (a network of professionals from the Sikh community) and Limmud (a Jewish educational charity). The aim of the project is to bring people together from different faith communities to look at practical issues of shared concern, such as intergenerational relations, and to share good practice amongst different faith communities in London.

### **Financial Observations**

The financial information provided in Question 8 of the application is taken from BMSD's last set of audited accounts, which are for the year ended 31st August 2011 and show a deficit of £10,407 (26% of turnover). The charity's reserves policy states that it aims to hold a minimum of three months' worth of running costs in reserve. As at 31<sup>st</sup> August 2011, unrestricted free reserves amounted to £29,065 which equated to seven months' worth of total expenditure in that year.

Draft accounts for the following year to 31<sup>st</sup> August 2012 show an overall deficit of £14,582 (56% of turnover). This comprises planned deficits of £6,927 on restricted funds and £7,655 met from unrestricted reserves. The balance sheet shows that unrestricted free reserves reduced to £22,409, however, due to the reduction Director's hours, projected expenditure in the current year 2012/13 has reduced to £23,289 (2011/12: £40,449), the free reserves holding now represents 11.5 months' worth of expenditure. The lower expenditure in 2012/13 reflects the completion of time-expired funding from the Trust for London.

An overall surplus of just over £4,000 is projected for 2012/13.

### **Officer's Appraisal**

Whilst very small, BMSD plays an important role in fostering community cohesion and increasing understanding amongst different cultures. At the time of assessment, BMSD was in receipt of a three year grant from the Joseph Rowntree Charitable Trust (JRCT) which is due to end in September 2013. A further application will be submitted to JRCT and applications to other trusts and foundations are currently awaiting a decision. It is therefore recommended that if you approve a grant today, it is conditional on the Trust not being BMSD's single largest funder.

### **Recommendation**

**£45,000 over three years (3 x £15,000) towards the Director's salary and other running costs of BMSD, on condition that the Trust is not the charity's single largest funder.**



# The City Bridge Trust

Charity Registration Number: 1035628

## Working with Londoners: Application for a grant

Please read the guidance notes before completing this form

Reference:  
(office use only)

11313

Date Received:

24/07/2012

Programme  
Area:

02

### 1. About your organisation

Name of organisation applying for grant: <b>British Muslims for Secular Democracy</b>	
If the organisation is part of a larger organisation, what is its name?	
Address for correspondence: <b>37 Museum Street London</b>	
Postcode: <b>WC1A 1LQ</b> Is this your home address? <b>No</b>	
Contact person: <b>Ms Tehmina Kazi</b>	Position: <b>Director</b>
Phone: <b>02072428691</b>	Fax:
E-mail: <b>director@bmsd.org.uk</b>	
Website: <b>http://www.bmsd.org.uk</b>	
Legal status of organisation: <b>Registered Charity</b>	
If registered, please give charity number: <b>1122730</b>	
Date organisation established: <b>14/08/2006</b>	

RECEIVED  
The City Bridge Trust  
30 JUL 2012

### 2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? <b>Bridging Communities</b>
Purpose for which funds are requested: (25 words maximum) <b>A contribution towards the Director's salary and overheads</b>
How much funding is requested? <b>Year 1: £15,000 Year 2: £15,000 Year 3: £15,000 Total: £45,000</b>

### 3. Aims of your organisation

British Muslims for Secular Democracy (BMSD) has been working since 2006 to oppose extremism in Muslim communities; combat Islamophobia in the media and wider society; and promote both civic and cultural engagement of Muslims with the indigenous population.

Our aims are:

- to raise awareness among British Muslims and the wider public, of a shared vision of citizenship and sense of belonging, underwritten by ideas of a secular democracy.
- to empower marginalised members of the British Muslim communities to become active participants in their society at the local and national levels
- to promote harmony between communities of different cultures, religions and backgrounds
- to encourage an understanding and celebration of the variety of Muslim cultures, values and traditions, now embedded in British society.

### 4. Main activities of your organisation

To achieve these aims we work in four main areas: Education and Training, Research, Cultural Exchange, and Lobbying and influencing. This includes:

- facilitating discourse and raising awareness of democracy and its benefits
- raising awareness of religious influence on UK domestic and foreign policies, particularly those which may lead to undue effect on civil liberties
- vigorously rebutting and condemning extremist views and actions
- empowering Muslim communities to become active participants in their local communities
- improving the sense of belonging and citizenship within Muslim communities
- advocating issues that affect Muslim communities at all relevant decision making levels, and within service provision sectors
- engaging with marginalised Muslim communities, and helping to identify root causes of deprivation and social exclusion, and help work towards a solution
- providing a lively and interesting social/educational programme which showcases the variety of Muslim histories, cultures, values and traditions in the UK today

### 5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
1	0	8	5

### 6. How do you support your volunteers?

We accept that different volunteers are able to offer different levels of involvement at different times. We have built volunteers' self-esteem by giving them a sense of ownership over their work. The Director recommended one volunteer on LinkedIn, and assisted another with his own enterprise.

### 7. Property occupied by your organisation

Is the main property owned or leased/rented by your organisation?	If leased/rented, how long is the outstanding lease/rental agreement?
<b>Leased</b>	<b>For renewal in October 2012</b>

## 8. Finance

From your most recent audited or independently examined accounts, complete the following:

Financial year ended - **Month: August**

**Year: 2011**

Income received from:	£
Voluntary income	39,335
Activities for generating funds	0
Investment income	61
Income from charitable activities	0
Other sources	0
<b>Total Income</b>	<b>39,396</b>

Expenditure:	£
Charitable activities	48,015
Governance costs	1,788
Cost of generating funds	0
Other	0
<b>Total Expenditure:</b>	<b>49,803</b>
<b>(Deficit)/surplus for the year:</b>	<b>(10,407)</b>

Asset position at year end:	£
Fixed assets	1
Investments	0
Net current assets (liabilities)	37,992 37,990
Long-term liabilities	0
<b>*Total A:</b>	<b>37,993</b>

Reserves at year end:	£
Endowment funds	0
Restricted funds	7,927
Unrestricted funds	30,066
<b>*Total B:</b>	<b>37,993</b>

\* Total A and Total B must be the same and should be taken from your balance sheet

*Checked  
Mar 13.*

## 9. Statutory funding

For the financial year above, what % of your income was from statutory sources?  
**0%**

## 10. Material changes

Describe any material changes to the organisation's activities, structure or financial position since the date of the most recent accounts:

**We have received £5,000 in core costs from the Garfield Weston Foundation, and £2,000 for a one-off project from the Evening Standard Dispossessed Fund.**  
**Dr Wannette Tuinstra, the Human Rights Outreach Officer, was employed on a one-year contract from November 2010 to November 2011. She worked 14 hours per week.**  
**Bashiera Rosser-Owen joined the Board of Trustees in December 2011, and contributed fundraising expertise.**

## 11. Previous applications to the Trust

Have you applied to the Trust before? If so, please give details:			
Month/Year:	Ref:	Grant received:	OR application rejected?
Month/Year:	Ref:	Grant received:	OR application rejected?
Month/Year:	Ref:	Grant received:	OR application rejected?

## 12. Previous funding received

Funding received by your organisation from the following sources during the last **THREE** years:  
**(i)** City of London (other than the City Bridge Trust)**(ii)** London boroughs **(iii)** London Councils (formerly ALG)  
**(iv)** Health authorities **(v)** Central government departments **(vi)** Other statutory bodies (e.g. Housing Corporation, Arts Council) - List source, years and annual amounts:

	Year: 2009	Year: 2010	Year: 2011
(i)			
(ii)			
(iii)			
(iv)			
(v)			
(vi)			

## 13. Previous grants received

Grants received by your organisation from charitable trusts and foundations (other than the City Bridge Trust) during the last **TWO** years. List source, years and annual amounts:

	Year: 2010	Year: 2011
Joseph Rowntree Charitable Trust	4,200	18,150
Trust for London	20,000	20,000
Evening Standard Dispossessed Fund		2,000
Garfield Weston Foundation		5,000

## 14. What steps is your organisation taking to reduce its carbon footprint?

We have adopted certain measures recommended by the 10:10 climate campaign. For example, we keep electronic devices to a minimum, and retain them for at least four years. Instead of using a desktop computer, we have a laptop (which is always turned off at the end of each day).

We buy or borrow second-hand books, and share stationery and office space with a Human Resources Consultant.

We only print hard copies of documents when it is absolutely necessary, and even then, we prefer to use two-sided copying.

We try to use dishes and utensils instead of paper plates.

The Director always takes public transport to work.



## 15. Purpose

Complete this section whatever the amount of grant requested. **In addition**, if the request is for £25,000 or more in total, a fuller proposal should be sent with this form. Also, if your application is for all or part of new or existing post(s), please enclose a copy of the relevant job description(s) including the salary level.

**In order to provide the right information, please refer to guidance note 1.5 before completing this section.**

The most compelling evidence for these projects is the peer research conducted by the Fitzrovia Youth in Action on Muslim identity and community cohesion. It clearly demonstrates that there are issues of concern amongst young members of the Somali and Bangladeshi community. Overwhelmingly, young Muslims do not feel that the contribution of Muslims to British society has been recognised, more Muslim role models are needed and the Government does not listen to the Muslim community. 97% felt that there should be more opportunities for young Muslims and non-Muslims to work together to understand each other better. 57% felt that there were not enough Muslim youth workers in Camden.

Nationally, the Citizenship Survey produced by the Department of Communities & Local Government highlights a decrease in the percentage of people who feel they are able to affect decisions in their local community. This is also reflected in the trends with regards to ability to affect national decisions.

When the Citizenship Foundation consulted organisations across London, they found that there were a lack of engagement opportunities being taken up by young people from communities impacted by conflict and newly arrived asylum seeker and refugee communities, as evidenced by the London Empowerment Map project.

We seek to develop two existing active citizenship projects; one with refugees of different backgrounds, and an interfaith social action project.

BMSD has undertaken 12 democracy workshops with refugees at the Bethnal Green charity Praxis, from 2008 until the present day; more are planned. The objectives are to increase refugees' knowledge of civic engagement opportunities, and to raise their confidence in seizing them. Each BMSD democracy workshop has between 12 and 18 participants, and the Director takes an active role in facilitation. Participant feedback has been very strong e.g. one person remarked that it presented "higher educational opportunities for refugees." Other participants stated that the workshop taught them "how to communicate with different religious groups" and "how to live together with different religions."

We have also organised a series of interfaith action sessions since November 2011. The objectives are to unite people from different faith communities in addressing practical issues of shared concern, such as intergenerational relations. We are planning a major event in Spring 2013, with smaller events in the interim. Another key objective of this project is to share good practice among different faith communities in London. Meetings have already taken place in a variety of different settings, such as the Central London gurdwara and the Buddhist Society Hall.

We believe we are the right organisation to carry out this work, because we are the only organisation which works equally to combat both Islamophobia and Muslim extremism, and the injustices perpetrated against Muslim communities and those that take place within them. We have a strong track record across all this work.

Our organisation comprises experts and experienced practitioners in the fields of community development, Islamic theology, political participation, the mainstream media, BME cultural activities and equality and human rights. We currently employ just one full-time member of staff (the Director) who is supported by volunteers and a very active board of trustees.

Both projects have demonstrably united people from different backgrounds, strengthened community relations and engendered a sense of belonging for the participants. The interfaith meetings have featured stakeholders from Christian, Jewish, Sikh, Hindu, Muslim, humanist, and Buddhist backgrounds. The democracy workshops have welcomed people from countries including Bangladesh, Somalia, Pakistan, Iraq and Italy. We have tailored these workshops according to the needs of particular service users, and regularly review our monitoring forms in this regard.

**16. Explain how you will monitor and evaluate both your own outcomes and those of the programme under which you are applying.**

We will measure the democracy workshop outcomes by asking relevant questions on our monitoring forms. We will measure the interfaith social action outcomes through the quality of feedback generated by our events. We have established a social media portal, to enable people to inform us about any social action initiatives they may have taken (or good practice they may have shared) as a result of our project.

We will write an evaluation report for both projects, taking into account the number of beneficiaries, but more importantly, the extent to which their needs and expectations were met.

**17. Beneficiaries**

How many people will benefit from the grant per year? <b>100</b>			
In which local authority is your organisation based? <b>Camden</b>			
Which borough(s) of Greater London will benefit from this grant? (if more than one, please give % for each) <b>Camden and Tower Hamlets</b>			
At what address will the activity be located? <b>Various London boroughs, particularly Tower Hamlets</b>			
What age group will benefit? <b>Adult, over 16 years</b>			
What will the ethnic grouping(s) of the beneficiaries be?			
	<b>%</b>		<b>%</b>
White - British	<b>15</b>	Black - Caribbean	
White - Irish		Black - African	
White - Other (please describe)		Black - Other (please describe)	
Asian - Indian		Black - British	
Asian - Pakistani	<b>70</b>	Chinese	
Asian - Bangladeshi	<b>15</b>		
Asian - Other (please describe)		Other (please describe)	
			Open to everyone
What proportion of the beneficiaries will be disabled people? <b>0%</b>			

## 18. Funding required for the project

What is the total cost of the proposed activity/project?

(List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Director's salary (including National Insurance)	31,000	31,000	31,000	93,000
Office rent	4,000	4,000	4,000	12,000
Utilities	1,000	1,000	1,000	3,000
Report printing and dissemination	2,000	0	0	2,000
Workshops and other events	1,952	1,000	1,000	3,952
Telephone and postage	600	600	600	1,800
IT support	400	400	400	1,200
<b>TOTAL</b>	<b>40,952</b>	<b>38,000</b>	<b>38,000</b>	<b>116,952</b>

What income has already been raised? (List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
Garfield Weston Foundation	5,000			5,000
Joseph Rowntree Charitable Trust	24,971			24,971
Evening Standard Dispossessed Fund	2,000			2,000
European Foundation for Democracy	1,952			1,952
<b>TOTAL</b>	<b>33,923</b>			<b>33,923</b>

What other funders are currently considering the proposal?

Funder	£
Barrow Cadbury Trust	10,000
JP Getty Charitable Trust	30,400
Mercers Company	15,000
Volant Charitable Trust	15,000
<b>TOTAL</b>	<b>70,400</b>

## 19. Funding requested from the Trust

How much is requested from the Trust? (List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Director's salary contribution	14,000	14,000	14,000	42,000
Utilities	1,000	1,000	1,000	3,000
<b>TOTAL</b>	<b>15,000</b>	<b>15,000</b>	<b>15,000</b>	<b>45,000</b>

**20. Funding requested from the Trust (continued)**

When will the funding be required? <p style="text-align: center;"><b>20/11/2012</b></p>
Is the activity to continue beyond the period for which funding is requested? If so, how will it be resourced? <b>Yes, and we have already secured part of the funding from other sources. We have a fundraising strategy in place in order to raise further funding from alternative trusts and foundations.</b>
If any planning or other statutory consents are required for the project to proceed, what stage have the applications reached? <b>N/A</b>

**Declaration on behalf of applicant organisation**

I, <u>Tehmina Kazi</u> (your name)
am an authorised representative of <u>British Muslims for Secular Democracy</u> (your organisation)
within which I am <u>Director</u> (your position)
<b>To the best of my knowledge, all the information that I have provided in this application form is correct</b>
Signature <u>T. Kazi</u> Date <u>25/10/2012</u>

**Return the completed form to:** The City Bridge Trust  
City of London  
PO Box 270  
Guildhall  
London EC2P 2EJ

**Please**

- **do not send this application by fax or e-mail** - unless applying online, applications must be posted to the Trust
- **do send the information in the checklist** - if items are missing, your application will be returned to you
- **do send only the information in the checklist** - if further information is required, we will contact you
- **do ensure you have signed and dated this form** - we cannot accept forms which have not been signed and dated
- **do use the correct postage** - the completed form and additional materials are likely to exceed 100g in weight

**ASSESSMENT CATEGORY - Improving Londoners' Mental Health**

**Latin American Women's Aid**

**Ref: 11365**

**Amount requested: £96,560**

**Adv: Sandra Davidson**

**Base: Hackney**

**Benefit: London-wide**

**Purpose of grant request:** To improve mental health of children & their mothers who survived domestic violence and are from a marginalised migrant community (Latin America).

**Background**

Latin American Women's Aid (LAWA) was established in 1987 to provide a safe environment for Latin American women and children affected by domestic violence. It provides temporary accommodation and practical advice and information to help with their resettlement. The refuge promotes women's independence and self-reliance on a non-judgemental basis. As well as running its refuge, accommodating up to six families at a time, LAWA runs a full-time advice and advocacy service for Latin Americans who are survivors of domestic violence but who are not ready to go to a refuge. Here, women can access legal advice and guidance on family law, domestic violence and children's rights; get help with finding solicitors, GPs and schools; advice on welfare rights and housing; support in contacting the police, benefits agencies and immigration departments; and referrals to counselling services and other relevant agencies. LAWA has recently developed the Samira Project working in partnership with the IMECE Women's Centre.

**Funding History**

You have funded LAWA twice before: in April 2000 with a grant of £34,000 over three years towards a children's services project; and in February 2007 with £76,000 over three years for a broadly similar purpose. Most recent monitoring was assessed as 'good'.

**Current Application**

Officers have previously brought to your attention the needs of children and young people affected by domestic violence, in particular their mental health. You commissioned a joint report from NSPCC and Refuge to gain a clearer picture of the needs of children in London. The impact of violence on young people and children can be severe. The long term impact of domestic violence on children includes increased levels of attention deficit disorder, anxiety, stuttering, and asthma; reduced educational attainment and increased involvement in anti-social behaviour; street and playground violence. One of the key findings of your report was the significant gaps and shortages in services addressing the needs of children and young people living with domestic violence in London.

LAWA is asking for funds to engage a part-time Family Outreach Support Worker to co-ordinate and manage its support services to children and young people and their mothers who cannot or do not wish to use refuge services, having overcome the initial impact of domestic violence. The provision of support services for children and young people is a critical element of the range of services that are needed to help families survive domestic violence. The postholder will work closely with families in the local community, offering a wide range of support tailored specifically to each individual's needs.

If successful, it is envisaged that up to 90 children and young people will be supported annually. A key component of the role is to develop links with local community services and build close working relationships with schools and children's centres. A pilot version of this project led by a specially trained volunteer 1 dpw for a year has proved very successful and has supported 30 children and young people and 13 mothers.

### **Financial Observations**

The accounts for the year ended 31<sup>st</sup> March 2012 show an overall deficit of £1,660 (0.6% of turnover), which comprised a surplus on restricted funds of £6,381, offset by a deficit of £8,041 on unrestricted activity. The charity's reserves policy aims to hold three months' worth of core costs which equated to approximately £48,000 in 2011/12. At the year-end 31<sup>st</sup> March 2012, unrestricted free reserves amounted to £31,059 which equates to 2 months' worth.

LAWA has been funded for many years by its local authority (approximately 37% of total income) and has received grants from other sources including the Big Lottery and BBC Children in Need. The organisation anticipates breaking even in 2012/13 and 2013/14.

### **Officer's Appraisal**

LAWA is well connected and is influential in the domestic violence field. Its General Manager attends a number of meetings including the Multi-Agency Risk Assessment Conference (MARAC), Housing Working Group and Supporting People Forum. LAWA is also a member of Islington's Violence against Women's Sub-Group and Imkaan, the infrastructure support body for organisations working on gender violence issues. The appointment of a part-time Family Outreach Support Worker is vital to help improve the health and well-being of highly vulnerable children and young people and their families. This proposal meets the priorities of your mental health needs of children and young people theme.

### **Recommendation**

**£96,500 over three years (£32,500; £32,000; £32,000) for the salary of a p/t (28hpw) Family Support Outreach Worker and associated costs supporting the mental health needs of children and young people affected by domestic violence.**



# The City Bridge Trust

Charity Registration Number: 1035628

Reference:  
(office use only)

11365

Date Received:

06/09/12

Programme  
Area:

3.

## Working with Londoners: Application for a grant

Please read the guidance notes before completing this form

### 1. About your organisation

Name of organisation applying for grant:  
**Latin American Women's Aid**

If the organisation is part of a larger organisation, what is its name?  
**n/a**

Address for correspondence  
**The Print House,  
3<sup>rd</sup> Floor, 18 Ashwin Street  
London**

RECEIVED  
The City Bridge Trust

06 SEP 2012

Postcode: **E8 3DL**

Is this your home address? **No**

Contact person:  
**Ms Stephanie Orel**

Position:  
**General Manager**

Phone: **02072750321**

Fax:

E-mail: **stephanie@lawadv.org.uk**

Website: **www.lawadv.org.uk**

Legal status of organisation: **Charity**

If registered, please give charity number: **299975**

Year and month organisation established: **Sept 1988**

### 2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)?

**Improving Londoners' mental health**

Purpose for which funds are requested: (25 words maximum)

**To improve the mental health of children & their mothers who survived domestic violence and are from a marginalised migrant community (Latin America) through emotional and practical support services.**

How much funding is requested?

**Year 1: £ 32,520 Year 2: £32,020 Year 3: £32,020**

**Total: £96,560**

### 3. Aims of your organisation

To empower Latin American (LA) women and their children who are fleeing from domestic violence to start a new life and facilitate their integration into the wider UK society through tailored advice & advocacy services as well as emergency accommodation.

- Helping women to recognise when they are affected by domestic violence and identify the dynamics of abuse
- Empowering women to become independent and take control of theirs & their children's lives
- Providing the practical and emotional support BME women and children need to exit a violent home and helping them overcome their additional barriers to safety such as language, insufficient knowledge of the UK system, fear of the UK authorities.
- Being a portal of integration by encouraging women to become active members of society
- Helping to increase awareness and shared knowledge of issues facing BME women & children

### 4. Main activities of your organisation

We run an advice and information centre, a women's refuge and various workshops.

Overview Advice & Information Centre (FT =Full Time, PT = Part Time):  
 DV Advice & Advocacy Project (FT): providing advice & advocacy on personal safety planning, emergency interventions, criminal justice remedies, housing, welfare benefits, providing access to counselling, solicitors, community activities, ESOL classes, support for children and resettlement. London wide, via personal appointments or telephone/email.  
 Samira Project (PT): similar as above, with the addition of outreach surgeries in the local community which are also accessible to women from other ethnic minorities. London wide.  
 Pilot Family Outreach Project (PT): providing practical and therapeutic support to children and mothers, who require therapeutic interventions due to the emotional damage caused by the traumatic experiences of abuse, increasing mental health and well-being .  
 Overview Refuge: Refuge Worker (FT): providing emergency accommodation, advice on housing & welfare benefits, community activities and ESOL classes.  
 Children's Support Worker (PT): supporting children to overcome their traumatic experiences, rebuild the relationship with their mothers and integrate into the community.

### 5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
3	3	6	3

### 6. How do you support your volunteers?

Through a comprehensive induction to our services and policies, training plans tailored to their individual needs and regular feedback meetings (monthly). We also encourage volunteers to participate in key strategic planning events and meetings.

### 7. Property occupied by your organisation

Is the main property owned or leased/rented by your organisation?	If leased/rented, how long is the outstanding lease/rental agreement?
Rented	Renewed annually(last 6y)



## 8. Finance

From your most recent audited or independently examined accounts, complete the following:

Financial year ended -

Month: **March**

Year: **2012**

Income received from:	£
Voluntary income	112,470
Activities for generating funds	0
Investment income	155
Income from charitable activities	159516
Other sources	
<b>Total Income</b>	<b>272,141</b>

Expenditure:	£
Charitable activities	270358
Governance costs	3443
Cost of generating funds	
Other	
<b>Total Expenditure</b>	<b>273801</b>
<b>(Deficit)/surplus for the year:</b>	<b>(1660)</b>

Asset position at year end	£
Fixed assets	0
Investments	0
Net current assets	43849
Long-term liabilities	0
<b>*Total A</b>	<b>43849</b>

Reserves at year end	£
Endowment funds	0
Restricted funds	12790
Unrestricted funds	31059
<b>*Total B</b>	<b>43849</b>

\* Total A and Total B must be the same and should be taken from your balance sheet

## 9. Statutory funding

For the financial year above, what % of your income was from statutory sources?  
40.6%

## 10. Material changes

Describe any material changes to the organisation's activities, structure or financial position since the date of the most recent accounts:

None

## 11. Previous applications to the Trust

Have you applied to the Trust before? If so, please give details:						<input checked="" type="checkbox"/>
Month/Year: Apr	/	2006	Ref:	Grant received: £38250	OR application rejected	<input type="checkbox"/>
Month/Year: Apr	/	2008	Ref:	Grant received: £56875	OR application rejected	<input type="checkbox"/>
Month/Year: -	/	-	Ref:	Grant received: £	OR application rejected	<input type="checkbox"/>

## 12. Previous funding received

Funding received by your organisation from the following sources during the last **THREE** years:  
**(i)** City of London (other than the City Bridge Trust) **(ii)** London boroughs **(iii)** London Councils (formerly ALG)  
**(iv)** Health authorities **(v)** Central government departments **(vi)** Other statutory bodies (e.g. Housing Corporation, Arts Council) - List source, years and annual amounts:

	Year: 2009	Year: 2010	Year: 2011
(i) L.B of Islington	166876	124456	84,213
(ii)			
(iii)			
(iv)			
(v)			
(vi)			

## 13. Previous grants received

Grants received by your organisation from charitable trusts and foundations (other than the City Bridge Trust) during the last **TWO** years. List source, years and annual amounts:

	Year: 2010	Year: 2011
Big Lottery Fund	12047	61100
Help a London Child	1000	1000
Rents & Mgmt Charges	48844	59984

## 14. What steps is your organisation taking to reduce its carbon footprint?

- Renting offices at Print House which is a building powered by 70% solar energy from its own solar panels on the roof. The solar photo voltaic (PV) panels are the biggest solar installation of its kind in London and are made up of 184 square metres of photovoltaic roof tiles. These generate 21,000 kilowatt hours of electricity a year whilst saving over 12 tonnes of carbon dioxide. This makes The Print House one of the most productive PV roofs (per sqm) in the UK. At the weekends when the electricity use is lower it exports power to the national grid.
- All management committee members, employees and volunteers commute to and from the office either on public transport or by bicycle. Currently four team members cycle to the office on a daily basis, one of which even cycles to our Hackney based office from Brixton (20 miles per day to and from the office).
- Increasing use of electronic files, data archives and casework forms.
- Recycling paper, glass and print cartridges (at specialised recycling sites).

## 15. Purpose

Complete this section whatever the amount of grant requested. **In addition**, if the request is for £25,000 or more in total, a fuller proposal should be sent with this form. Also, if your application is for all or part of new or existing post(s), please enclose a copy of the relevant job description(s) including the salary level.

**In order to provide the right information, please refer to guidance note 15 before completing this section.**

LAWA has worked with Latin American survivors of domestic violence (DV) for 25 years and repeated consultations with our service users have indicated a strong need for a Family Outreach Support Worker specifically addressing the needs of children and young people (CYP) and their mothers who cannot or do not wish to use refuge accommodation. Although our advice services address the needs of women holistically and provide protection along statutory lines to children, we have identified a substantial gap in support services for CYP to overcome the long-term effects of the violence they experienced.

Mothers who are recovering from the trauma of abuse usually struggle to meet the aspirations and emotional needs of their children. They often face a range of problems such as unemployment, overcrowded housing, poverty, poor parenting skills and child protection issues (4). Assisting and empowering them in their role as mothers is of critical importance to ensure CYP can improve their mental health and life choices.

With 113,500 people the Latin American community in London is substantial yet one of the most marginalised ethnic minority communities (1,6). Generally 40% of women (and CYP) from ethnic minority backgrounds tend to stay in abusive relationships for 5 years or more, typically due to lack of knowledge of their rights and fear of approaching agencies for help. In 75-90% of violent incidents children are in the same or next room (2,3). In these cases CYP often develop needs for specialised assistance as they have either constantly witnessed harrowing scenes of violence or been subjected to abuse themselves. Many are at risk of suffering long term mental health impacts, schooling problems, or might even get into trouble with the law, which not only adversely affects their chances in life but also the family's mental health and wellbeing.(2)

Having a Family Outreach Support Worker would enable us to reach at least 4 times as many CYP and a wider age group than we can reach at the moment. This would empower at least 80-90 CYP per year to have a stronger voice in their own development, express their emotions, break their isolation and improve their mental health.

Objective 1: Latin American children and young people receive support which facilitates their long-term recovery from their exposure to, and experiences of, DV.

Objective 2: Latin American children and young people improve their mental health and wellbeing, raise their self-esteem and gain perspectives for the future.

Objective 3: Latin American children and young people receive tailored guidance which enhances their personal development and helps them attain their individual goals.

Objective 4: Latin American mothers increase their ability to meet their children's needs and enhance the wellbeing of their families.

A specially trained volunteer has been delivering a 1 day/week pilot version of this project at LAWA since December 2011 and has supported 30 CYP and 13 mothers. 100% of these clients were highly satisfied with this service and asked for it to continue as it enabled them to significantly improve their mental health and life choices.

LAWA has 25 years of experience in working against DV, providing a culturally sensitive service aimed at the particular needs of marginalised migrant women and CYP fleeing from DV. Our experience in providing highly effective support services to CYP in our refuge have enabled us to develop this project which will allow us to reach an increased number of vulnerable CYP and their mothers in their homes. This project meets the "Improving Londoner's Mental Health" theme, by supporting CYP and their mothers in London affected by DV and preventing long term mental health damage as a consequence (5). It will directly address the effects of DV on the beneficiaries and aims to help them cope in the short and long term to ensure their risk of developing serious mental health problems is significantly reduced. We meet the CBT principles of good practice through 1) involvement of beneficiaries through regular consultations, 2) welcoming women and children from all Latin American countries and other Spanish/Portuguese speakers, 3) regular training for volunteers and involving them in strategic project development, 4) located in a building using 70% solar power, encouraging all staff & volunteers to use public transport/cycle to the office and recycle wherever possible

**16. Explain how you will monitor and evaluate both your own outcomes and those of the programme under which you are applying.**

Levels of psycho-social health and wellbeing will be measured through a specialised wellbeing index survey targeting CYP and their mothers. The target for a three year period is 40 families (140 people) per year, totaling approximately 120 families (420 people) in total. Needs assessments will be conducted on an individual and family basis and progress towards meeting those needs will be measured through quarterly reviews. Increased awareness by service users of the impact of DV on the family will be measured through a knowledge, attitudes and behaviour survey.

Monitoring data for this project will be gathered by the caseworker on a weekly basis. It will then be evaluated monthly during the caseworker's supervision sessions and through quarterly evaluation reviews to ensure adequate progress towards the project objectives and outcomes. Baseline data to evaluate impact will be gathered in year one and subsequently in years two and three to monitor progress.

**17. Beneficiaries**

How many people will benefit from the grant per year? **140**

In which local authority is your organisation based?  
**On the border of Islington and Hackney**

Which borough(s) of Greater London will benefit from this grant?  
(if more than one, please give % for each)  
**All London boroughs**

At what address will the activity be located? **The Print House, 18 Ashwin Street, London E8 3DL and family's homes**

What age group will benefit? **0-60 years**

What will the ethnic grouping(s) of the beneficiaries be?

	%		%
White - British		Black - Caribbean	
White - Irish		Black - African	
White - Other (please describe) <b>Spanish &amp; Portuguese</b>	<b>20</b>	Black - Other (please describe)	
Asian - Indian		Black - British	
Asian - Pakistani		Chinese	
Asian - Bangladeshi			
Asian - Other (please describe)		Other (please describe) <b>Latin American</b>	<b>80</b>
Open to everyone			

What proportion of the beneficiaries will be disabled people?  
**Typically not many disabled people approach our services, last year 1% but we are open to receiving clients with disabilities.**

## 18. Funding required for the project

What is the total cost of the proposed activity/project?  
(List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Family Outreach Support Worker (4days/w)	25,144	25,144	25,144	75,432
Staff Supervision	1,076	1,076	1,076	3,228
Staff Training & (incl Conferences)	600	600	600	1,800
Staff Recruitment	500			500
Travel & Subs	300	300	300	900
Office Rent,Rates,Heat & Light	1,500	1,500	1,500	4,500
Repairs & Maintenance (Cleaning)	300	300	300	900
Printing, Postage & Stationery	650	650	650	1,950
Insurance	150	150	150	450
Telephone, Sundries, Subscriptions	750	750	750	2,250
Legal & Professional Fees (incl Audit)	350	350	350	1,050
Activities for Users	1,200	1,200	1,200	3,600
<b>TOTAL</b>	<b>32,520</b>	<b>32,020</b>	<b>32,020</b>	<b>96,560</b>

What income has already been raised?  
(List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
<b>TOTAL</b>				

What other funders are currently considering the proposal?

None yet.

## 19. Funding requested from the Trust


How much is requested from the Trust? (List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Family Outreach Support Worker (4days/w)	25,144	25,144	25,144	75,432
Staff Supervision	1,076	1,076	1,076	3,228
Staff Training & (incl Conferences)	600	600	600	1,800
Staff Recruitment	500			500
Travel & Subs	300	300	300	900
Office Rent,Rates Heat & Light	1,500	1,500	1,500	4,500
Repairs & Maintenance (Cleaning)	300	300	300	900
Printing, Postage & Stationery	650	650	650	1,950
Insurance	150	150	150	450
Telephone, Sundries, Subscriptions	750	750	750	2,250
Legal & Professional Fees (Incl Audit)	350	350	350	1,050
Activities for Users	1,200	1,200	1,200	3,600
<b>TOTAL</b>	<b>32,520</b>	<b>32,020</b>	<b>32,020</b>	<b>96,560</b>

## 20. Funding requested from the Trust (continued)

When will the funding be required? <b>At the earliest convenience</b>
Is the activity to continue beyond the period for which funding is requested? If so, how will it be resourced? <b>Yes. Through the development of a tailored funding strategy which includes the identification of alternative funders, funding diversification (factoring in corporate, individual and online fundraising mechanisms) and ensuring that our project's service delivery is oriented along key government strategies such as Together We Can End Violence Against Women and Girls.</b>
If any planning or other statutory consents are required for the project to proceed, what stage have the applications reached? <b>No planning or statutory consents are required</b>

### Declaration on behalf of applicant organisation

I, <b>Stephanie Orel</b> (your name)
am an authorised representative of
<b>Latin American Women's Aid</b> (your organisation)
within which I am <b>the General Manager</b> (your position)
<b>To the best of my knowledge, all the information that I have provided in this application form is correct</b>
Signature 
Date <b>05/09/12</b>

**Return the completed form to: The City Bridge Trust**  
City of London  
PO Box 270  
Guildhall  
London EC2P 2EJ

#### Please

- **do not send this application by fax or e-mail** - unless applying online, applications must be posted to the Trust
- **do send the information in the checklist** - if items are missing, your application will be returned to you
- **do send only the information in the checklist** - if further information is required, we will contact you
- **do ensure you have signed and dated this form** - we cannot accept forms which have not been signed and dated
- **do use the correct postage** - the completed form and additional materials are likely to exceed 100g in weight

**MEETING: 18/04/2013**

**ANNEX NUMBER: 6**

**ASSESSMENT CATEGORY - Improving Londoners' Mental Health**

**St Cuthbert's Centre**

**Ref: 11588**

**Amount requested: £46,500**

**Adv: Ciaran Rafferty**

**Base: Kensington & Chelsea**

**Benefit: Ken & Chelsea;  
Hammersmith & Fulham**

**Purpose of grant request:** Contribution to salary costs of Deputy Manager delivering mental health services to elderly and homeless beneficiaries in Earl's Court.

**Background**

St Cuthbert's Centre (SCC) in Earl's Court has been operating since the 1980s and became a registered charity in 1990. SCC is located within St Cuthbert's Church Hall but is a separate organisation from the adjoining Church (albeit they have a very close bond and working relationship). The Church hall is an interesting building in itself, being the first community centre in Kensington and the first building of its kind to have a stage area.

SCC the charity offers an open-door drop in centre providing support for the homeless and rough sleepers and all those who are marginalised and vulnerable in the surrounding areas. Many of the clientele have mental health issues. This part of London has seen many changes in its population profile over the years (Arabic is currently the No.2 language spoken) and has quite severe pockets of deprivation.

**Funding History**

None.

**Current Application**

As funding cuts have eroded the scope and capacity of local services demand has risen on those that remain, including SCC. For example, another centre for homeless people which previously operated as a drop-in 5 days per week now offers just 1 hour per day - and only for referrals (people can't just walk in). SCC, not traditionally being dependent on local government funding, has therefore managed to become less directly affected by cuts in that sector although the pressure to raise funds from other sources is no less acute.

SCC provides physical shelter and warmth 5 days per week and a range of support services including information and advice; counselling and training courses; access to a health worker; social events, computer literacy classes; and a cooked lunch. It doesn't just work with those who

are homeless – many clients are elderly people living alone and often in poverty and for whom the Centre provides social contact and support.

This application is for a contribution to the salary costs of the organisation's Deputy Manager as it is this post which will oversee most of the work supporting those clients with mental health needs (estimated to be 50% of the total number of people seen at the Centre). The focus will be on all ages including those aged over 60 who are not homeless but living alone and who are, as the organisation expertly describes "...on the cusp between independence and intervention".

### **Financial Observations**

Audited accounts for the year ended 31<sup>st</sup> March 2012 show a surplus of £530 (0.5% of turnover).

The organisation's reserves policy states that it aims to hold 6 months' worth of its normal level of expenditure, which equates to £94,195 based on expenditure in the current year 2012/13. Unrestricted free reserves held at 31 March 2012 amounted to £51,559 representing 3.3 months' worth of expenditure.

The latest forecast for the current year to 31<sup>st</sup> March 2013 shows a surplus of £610. The budget for 2013/14 also indicates a surplus (of £16,747) based on total income of £180,000, of which £87,500 (49%) has yet to be secured from other funders.

### **Officer's Appraisal**

SCC is fully knowledgeable of and committed to addressing the mental health needs of homeless and vulnerable people in this area. Its Chairman serves on the West London Mental Health Trust; its senior staff are trained in health and social care; and the Centre provides formal mental health assessments (through its new post of Mental Health Outreach Worker – funded by the CLSA Chairman's Trust). It is networked into other services and agencies so that those assisted can be moved where appropriate (and so that people can be referred to SCC in turn). This is an organisation rooted in, knowledgeable of, and fully committed to its community and which can be commended for its drive to help those who would otherwise be under the radar of statutory services but no less in need.

### **Recommendation**

**£46,500 over three years (£15,000; £15,500; £16,000) towards the salary and related costs of the Deputy Manager.**





# The City Bridge Trust

Charity Registration Number: 1035628

## Working with Londoners: Application for a grant

Please read the guidance notes before completing this form

Reference:  
(office use only)

11588

Date Received:

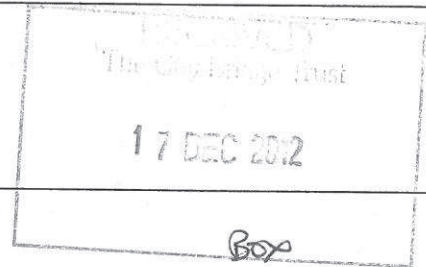
17/12/12

Programme  
Area:

3

### 1. About your organisation

Name of organisation applying for grant: <b>St Cuthbert's Centre</b>	
If the organisation is part of a larger organisation, what is its name? <b>N/A</b>	
Address for correspondence <b>51 Philbeach Gardens, Earl's Court, London</b>	
Postcode: <b>SW5 9EB</b> Is this your home address? <b>No</b>	
Contact person: <b>Mr Christopher Uncles</b>	Position: <b>Hon. Treasurer &amp; Trustee</b>
Phone: <b>0207 835 1389</b>	Fax:
E-mail: <b>dropin@stcuthbertscentre.org.uk</b>	
Website: <b>www.stcuthbertscentre.org.uk</b>	
Legal status of organisation: <b>Registered Charity</b>	
If registered, please give charity number: <b>803638</b>	
Year and month organisation established: <b>12/1990</b>	



### 2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? <b>Improving Londoners' mental health</b>
Purpose for which funds are requested: (25 words maximum) <b>Contribution to salary costs of Deputy Manager delivering mental health services to elderly and homeless beneficiaries in Earl's Court.</b>
How much funding is requested? <b>Year 1: £15,000 Year 2: £15,500 Year 3: £16,000</b> <b>Total: £46,500</b>

### 3. Aims of your organisation

The objects of the company are the relief of poverty, hardship, sickness and distress amongst persons in Greater London.

St Cuthbert's is part funded by RB Kensington & Chelsea to provide a 'mezzanine' level of care to people who have come to be wary or even fearful of the statutory interventions made by the Community Mental Health Teams and/or Social Workers.

Many face an acute dilemma between suffering alone with their condition or suffering their engagement with the psychiatric establishment. Without St Cuthbert's' intercession, they would become estranged from all service providers and quietly deteriorate on their own.

St Cuthbert's mission statement is 'proving the community cares.'

### 4. Main activities of your organisation

St Cuthbert's is the only drop-in centre in Earl's Court. It welcomes an average of 52 people a day (150+ per month and 600+ per annum). About two thirds are male, half are over sixty and a third use drugs/ alcohol. A quarter are homeless, a quarter have mental health diagnoses (inc. schizophrenia and dementia) and a tenth have a dual diagnosis.

St Cuthbert's offers them a sanctuary. It is open from 10.30am-3.30pm, five days a week. It provides free showers, laundry and a clothes bank; weekly health checks (visiting nurse); subsidised food (breakfast/lunch); free IT facilities and voicemail (esp. for those of no fixed abode); books, games and organised social activities (bingo and summer outings).

These provisions are made to welcome, settle and build trust, until the beneficiaries feel ready to open up and access the one-to-one advice, referrals, representation and counselling services provided by the Centre Manager, his Deputy and the Mental Health Outreach Worker. This is where the real work is done to prevent evictions, defuse social issues and mediate the beneficiaries' engagement with the statutory services.

### 5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
4	1	8	15

### 6. How do you support your volunteers?

There is a detailed Job description, Induction Pack and all Volunteers sign a code of conduct. They are taken through all the policies and guidelines and are supervised/supported by Senior Volunteer Coordinator, Centre Manager and his Deputy.

### 7. Property occupied by your organisation

Is the main property owned or leased/rented by your organisation?	If leased/rented, how long is the outstanding lease/rental agreement?
Yes	3 years

## 8. Finance

From your most recent audited or independently examined accounts, complete the following:

Financial year ended -

Month: **March**

Year: **2012**

<b>Income received from:</b>	<b>£</b>
Voluntary income	86,129
Activities for generating funds	
Investment income	
Income from charitable activities	13,384
Other sources	15,085
<b>Total Income</b>	<b>114,598</b>

<b>Expenditure:</b>	<b>£</b>
Charitable activities	109,122
Governance costs	4,946
Cost of generating funds	
Other	
<b>Total Expenditure</b>	<b>114,068</b>
<b>(Deficit)/surplus for the year:</b>	<b>530</b>

<b>Asset position at year end</b>	<b>£</b>
Fixed assets	19,551
Investments	
Net current assets	51,559
Long-term liabilities	(55,000)
<b>*Total A</b>	<b>16,110</b>

<b>Reserves at year end</b>	<b>£</b>
Endowment funds	
Restricted funds	
Unrestricted funds	16,110
<b>*Total B</b>	<b>16,110</b>

\* Total A and Total B must be the same and should be taken from your balance sheet

## 9. Statutory funding

For the financial year above, what % of your income was from statutory sources?  
7%

## 10. Material changes

Describe any material changes to the organisation's activities, structure or financial position since the date of the most recent accounts:

The trustees of St Cuthbert's Centre have appointed Mr Jonathan McCafferty as a new trustee.

## 11. Previous applications to the Trust

Have you applied to the Trust before? If so, please give details:						<input checked="" type="checkbox"/>
Month/Year: -	/ -	Ref:	Grant received: £	OR application rejected		<input type="checkbox"/>
Month/Year: -	/ -	Ref:	Grant received: £	OR application rejected		<input type="checkbox"/>
Month/Year: -	/ -	Ref:	Grant received: £	OR application rejected		<input type="checkbox"/>

## 12. Previous funding received

Funding received by your organisation from the following sources during the last **THREE** years:  
**(i)** City of London (other than the City Bridge Trust) **(ii)** London boroughs **(iii)** London Councils (formerly ALG)  
**(iv)** Health authorities **(v)** Central government departments **(vi)** Other statutory bodies (e.g. Housing Corporation, Arts Council) - List source, years and annual amounts:

	Year: 2009	Year: 2010	Year: 2011
(i) Livery Companies			23,500
(ii) RB Kensington & Chelsea	6,000	6,000	6,000
(iii)			
(iv)			
(v)			
(vi)			

## 13. Previous grants received

Grants received by your organisation from charitable trusts and foundations (other than the City Bridge Trust) during the last **TWO** years. List source, years and annual amounts:

	Year: 2010	Year: 2011
Leathersellers' Company CT		12,500
Evening Standard Dispossessed Fund		10,000
Winton Charitable Foundation		12,000
Hilden Charitable Fund		7,000
NatWest Community Force		6,275
Trusts £5,000 and under	11,350	21,650

## 14. What steps is your organisation taking to reduce its carbon footprint?

Staff and volunteers are encouraged to use public transport whenever possible. The office and kitchen recycle all food packaging, paper and cardboard. Any excess food is given to beneficiaries so nothing is wasted.

St Cuthbert's Centre makes good use of second hand clothes, shoes, household goods and bedding that might otherwise go to landfill. In addition it receives surplus food from a number of local sources thus preventing surplus food from going to landfill, and thereby reducing its carbon footprint.

St Cuthbert's Centre recycles, reuses and extracts the maximum value from a broad range of products that would otherwise be thrown away by an aspirational and materialist society.

## 15. Purpose

Complete this section whatever the amount of grant requested. **In addition**, if the request is for £25,000 or more in total, a fuller proposal should be sent with this form. Also, if your application is for all or part of new or existing post(s), please enclose a copy of the relevant job description(s) including the salary level.

**In order to provide the right information, please refer to guidance note 15 before completing this section.**

St Cuthbert's began in 1987 with a vicar serving tea and sandwiches to the homeless. Since then it has grown into a sophisticated project filling a specific gap in the local welfare net. It specialises in looking after those who defy the statutory services' best efforts to count, account or care for them. In most cases, they have a long 'history' with the Community Mental Health Teams and/or Social Services and the fact that St Cuthbert's is not a statutory body is of paramount importance to them.

The beneficiaries live on the cusp between independence and intervention. The over 60's tend to be proudly independent but increasingly frail. The under 60's tend to have chronic mental diagnoses but they hide their symptoms and live in fear of discovery. Both groups develop elaborate coping mechanisms, which usually perpetuate their estrangement. Some are so acutely disempowered that they cling to the flimsiest of liberties and reject well meaning attempts to help. Their apparent intransigence causes hurt and confusion on both sides and as a result, misunderstandings with landlords or neighbours can be every bit as harmful as benefits mix-ups or medication issues.

St Cuthbert's deals with this care quandry by giving its beneficiaries as much autonomy as possible. It is a two step project, designed to give its beneficiaries full and unfettered access to all its services for as long as it takes to make them feel safe. No questions are asked in step one and it can take years for an isolated individual to finally take step two. About half of the beneficiaries do eventually engage with the one-to-one services but this decision is up to them and them alone. In this way St Cuthbert's gives its beneficiaries a small but genuine measure of autonomy and in so doing, it gives them back something that the statutory services tend to take away.

Objectives:

- To improve the physical wellbeing of homeless, transient and elderly beneficiaries by providing food, clothing, washing facilities and weekly visits by a nurse (target 400 p.a.)
- To improve the autonomy of homeless, transient and elderly beneficiaries by providing advice, referrals and representation (including accompaniment to meetings) for physical health, mental health, detox, housing, benefits and legal issues (target 300 p.a.)
- To improve the mental and psychological health of homeless, transient and elderly beneficiaries by providing informal counselling (Centre Manager & Deputy) and mental health assessments (Mental Health Outreach Worker) (target 150 p.a.)
- To reduce isolation, loneliness and depression among homeless, transient and elderly beneficiaries by providing companionship and organised leisure activities (target 400 p.a.)

All the senior St Cuthbert's staff are appropriately trained to work with extremely vulnerable people. The Centre Manager and his Deputy have NVQ Level 4 and Level 3 qualifications in Health & Social Care and both are trained as, respectively, 'person centred' and 'psychosynthetic' counsellors. The new Mental Health Outreach Worker has recently been appointed. She has a BSc in Psychology and is an Accredited Therapeutic Counsellor. Her job is to provide mental health assessments, to forestall catastrophic deteriorations, to develop a flexible, recovery focused approach for those with extremely complex needs (eg. chronic psychotic illnesses) and to build the outreach service.

St Cuthbert's has achieved Pqasso level 1. It has found its niche and developed a strategy over the 25 years it has been working for its beneficiaries. Some have been attending for decades. The loyalty of the RB Kensington & Chelsea in part-funding the project for 16 years is testament to its local importance but the work it does is difficult and often challenging for the staff. They need exceptional social skills and a detailed knowledge of the relevant regulations and services on offer.

St Cuthbert's Centre's improves the mental health of Londoners by both: a) Tackling depression amongst older people and; b) supporting homeless people, transient people and rough sleepers.

**16. Explain how you will monitor and evaluate both your own outcomes and those of the programme under which you are applying.**

We will record the number of beneficiaries: having meals, showers or clothing; accessing the one-to-one advice, referrals and informal counselling; receiving mental health assessments; accessing mainstream services; helped to sustain their current accommodation/assisted into temporary and permanent housing; accessing the internet and compiling a CV; meetings with other relevant services.

Individual care plans will be used in collaboration with other agencies involved. The Centre Manager/Deputy & Mental Health Outreach Worker will record detailed information following each one-to-one meeting with a client. We are reluctant to ask clients to fill in detailed questionnaires as this service is not intended to be intrusive, particularly in view of the delicate nature of this client group. We have implemented our own relatively simple questionnaire to help measure our progress towards the outcomes.

We will record any informal feedback received from clients, other members of staff, and any other support agencies involved with them. We will monitor the number of beneficiaries reporting an improved sense of well-being, and reduced sense of isolation, through one-to-one feedback (including Evaluation Forms), annual user surveys and focus groups.

**17. Beneficiaries**

How many people will benefit from the grant per year? **400**

In which local authority is your organisation based?  
**RB Kensington & Chelsea**

Which borough(s) of Greater London will benefit from this grant?  
(if more than one, please give % for each)  
**RB Kensington & Chelsea 85%, Hammersmith & Fulham 15%**

At what address will the activity be located? **51 Philbeach Gardens, London SW5 9EB**

What age group will benefit? **18-80+**

What will the ethnic grouping(s) of the beneficiaries be?

	%		%
White - British	<b>70</b>	Black - Caribbean	<b>2</b>
White - Irish	<b>3</b>	Black - African	<b>3</b>
White - Other (please describe) <b>Eastern European</b>	<b>15</b>	Black - Other (please describe)	
Asian - Indian	<b>2</b>	Black - British	<b>3</b>
Asian - Pakistani		Chinese	<b>2</b>
Asian - Bangladeshi			
Asian - Other (please describe)		Other (please describe)	

Open to everyone **Yes**

What proportion of the beneficiaries will be disabled people?  
**10%**

## 18. Funding required for the project

What is the total cost of the proposed activity/project?

(List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Centre Manager	30,000	30,900	31,827	<b>92,727</b>
Deputy Manager	24,750	25,493	26,257	<b>76,500</b>
Mental Health Outreach Worker	26,000	26,780	27,583	<b>80,363</b>
Service Co-ordinator	24,000	24,720	25,462	<b>74,182</b>
Cook	14,000	14,420	14,853	<b>43,273</b>
Kitchen Helper	1,800	1,854	1,010	<b>4,664</b>
Employer's NIC	10,392	10,704	11,025	<b>32,121</b>
Office Costs	4,200	4,326	4,456	<b>12,982</b>
Utilities & Cleaning	7,700	7,931	8,169	<b>23,800</b>
Independent Examiner's Fees & Prof Costs	7,089	7,302	7,520	<b>21,911</b>
Food & Drink	3,228	3,325	3,425	<b>9,978</b>
Repairs, Insurance & Depreciation	9,100	9,373	9,654	<b>28,127</b>
Training, Consultancy & Travel	394	406	418	<b>1,218</b>
Bank Charges & Interest	600	618	637	<b>1,855</b>
<b>TOTAL</b>	<b>163,253</b>	<b>168,152</b>	<b>172,296</b>	<b>503,701</b>

What income has already been raised?

(List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
Leathersellers' Company	12,500	12,500		<b>25,000</b>
Martin Family Charitable Trust	15,000			<b>15,000</b>
CLSA Chairman's Trust	29,569	30,000		<b>59,569</b>
Antic. Catering/Hall Lets, RBK&C, WLCHC	44,750	39,750	39,750	<b>124,250</b>
<b>TOTAL</b>	<b>101,819</b>	<b>82,250</b>	<b>39,750</b>	<b>223,819</b>

What other funders are currently considering the proposal?

**Henry Smith £90,000 (core), Lloyds TSB £30,000, Gosling £15,000, Hobson £10,000, Anton Jurgens £10,000, French Huguenot £10,000, Trusthouse £9,999, AB £7,500, Mrs Smith & Mount £15,000, Woodlands £15,000, Steel CT £5,000 and Stanley Smith £5,000.**

## 19. Funding requested from the Trust

How much is requested from the Trust? (List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
55% Deputy Manager's basic salary & NIC	15,000	15,500	16,000	<b>46,500</b>
<b>TOTAL</b>	<b>15,000</b>	<b>15,500</b>	<b>16,000</b>	<b>46,500</b>

## 20. Funding requested from the Trust (continued)

When will the funding be required? **1<sup>st</sup> April 2013**

Is the activity to continue beyond the period for which funding is requested?

If so, how will it be resourced? **St Cuthbert's Centre will continue to apply to grant-giving trusts and charitable foundations on an ongoing basis as part of its fundraising strategy. It will also apply for 3-5 year funding wherever possible.**

If any planning or other statutory consents are required for the project to proceed, what stage have the applications reached? **N/A**

### Declaration on behalf of applicant organisation

I, **Christopher Uncles** (your name)

am an authorised representative of

**St Cuthbert's Centre** (your organisation)

within which I am **Hon Treasurer & Trustee** (your position)

**To the best of my knowledge, all the information that I have provided in this application form is correct**

Signature



Date **5<sup>th</sup> December 2012**

**Return the completed form to: The City Bridge Trust**

City of London

PO Box 270

Guildhall

London EC2P 2EJ

Please

- **do not send this application by fax or e-mail** – unless applying online, applications must be posted to the Trust
- **do send the information in the checklist** – if items are missing, your application will be returned to you
- **do send only the information in the checklist** – if further information is required, we will contact you
- **do ensure you have signed and dated this form** – we cannot accept forms which have not been signed and dated
- **do use the correct postage** – the completed form and additional materials are likely to exceed 100g in weight



**MEETING: 18/04/2013**

**ANNEX NUMBER: 7**

**ASSESSMENT CATEGORY - London's Environment**

**Federation of London Youth Clubs (London Youth)**

**Amount requested: £57,786**

**Ref: 11596**

**Adv: Ciaran Rafferty**

**Base: Hackney**

**Benefit: London-wide**

**Purpose of grant request:** To enhance young Londoners' knowledge and appreciation of the natural environment and to inspire them to become environmental advocates throughout London.

**Background**

London Youth is both the common and operational name for the Federation of London Youth Clubs – the umbrella body and key support agency for more than 400 community organisations working with over 75,000 of London's young people. Its Patron – and a very active one – is HRH The Duke of Edinburgh. He has been Patron since 1946, in fact since before he was married! The present day organisation results from the merger in 1999 of the London Union of Youth Clubs and the London Federation of Boys' Clubs.

London Youth's aim is to help young people be the best they can be and they do this by focusing on three key factors: development, opportunity and voice. Its programmes and activities are delivered to and through its member organisations and cover: youth action and youth leadership, sports development, employability, the London Youth Quality Mark (to develop and maintain good practice), and environmental work. It also runs two residential centres – Woodrow High House and Hindleap Warren – which offer unique opportunities for young Londoners to experience life outside the city.

**Funding History**

As you might expect the Trust has a long and regular history of supporting this key infrastructure body (and its original component bodies). In the past ten years the following grants have been made: November 2004 (£144,000) and then February 2007 (£75,000) to support volunteering across London; October 2009 (£135,000) towards the cost of training volunteer youth workers; and finally, in March 2010 (£100,000) for two years' support of a project helping and encouraging young people to develop and manage environmental initiatives. All grants have been satisfactorily monitored to date.

**Current Application**

This application is for a third year's support of the environmental project referred to above and which the organisation calls *Urban Nature*. The current grant is due to end in April 2013 but such has been the success of

this initiative – and the demand for it - that the organisation wishes it to continue for another year. Members will be pleased to note that this project won the 2012 Sustainable City Award in the Greening the Third Sector category.

Urban Nature works with a cohort of member organisations to educate, inspire and support young people on the natural environment and on what they can do to protect it. The programme commences with a residential at Hindleap Warren after which, armed with new learning and skills, the young pioneers return to their communities and engage their peers in improving the sustainability, biodiversity and/or greening of their local organisation or neighbourhood. Monitoring of the work to date has shown that, contrary to initial assumptions, the young pioneers do not just “go away” at the culmination of their projects but that they want to continue and to do more, constantly pushing boundaries and being ever more demanding – which is a good thing!

In the third year, should you agree funding, the project will be further developed so that continuing support can be given to some of the existing schemes (as well as the development of new projects) and also to incorporate opportunities for some of the young pioneers to access accredited training in this field (London Youth is currently negotiating this with a training provider).

### **Financial Observations**

The audited accounts for the year ended 31<sup>st</sup> August 2012 show an overall deficit of £51,194 (1.2% of turnover). This comprised a deficit on unrestricted activity of £131,088, partially offset by a surplus on restricted funds of £28,617 and a surplus on endowment funds of £51,277.

The charity’s reserves policy does not give a target figure but states that “Trustees seek to retain a prudent level of reserves free from unrestricted income.” The policy notes that as at the 31<sup>st</sup> August 2012, reserves stood at £723,787. This sum represented the charity’s holding of unrestricted free reserves and at that time was equivalent to 2 months’ worth of total expenditure. The policy states “Trustees believe unrestricted reserves stand at a satisfactory level in light of the adopted policy but will aim to increase unrestricted reserves where possible to improve the ratio to annual planned expenditure”.

For the current year to 31<sup>st</sup> August 2013, a forecast provided on 26<sup>th</sup> March shows a deficit of £26,100 (0.5% of turnover). This deficit will be met from unrestricted funds, which will reduce free reserves to approximately £698,000 – equivalent to 1.6 months’ worth of total expenditure.

### **Officer's Appraisal**

*Urban Nature* has been a very successful project to date and has clearly helped many young people to become instigators of positive environmental change in their communities. London Youth is an exceptionally valuable organisation, helping hundreds of organisations to constantly improve the level and quality of opportunities to young Londoners. A third year's support of this initiative will see a logical and welcome development of the work to encompass access to accredited training for the participants.

### **Recommendation**

**£55,000 for a third and final year's support of the Urban Nature initiative, subject to receipt of a satisfactory final report on the previous grant. The grant will provide for the salary costs of a f/t Project Co-ordinator plus associated support and delivery costs.**



# The City Bridge Trust

Charity Registration Number: 1035628

## Working with Londoners: Application for a grant

Please read the guidance notes before completing this form

Reference:  
(office use only)

11596

Date Received:

20/12/2012

Programme  
Area:

04

### 1. About your organisation

Name of organisation applying for grant: <b>The Federation of London Youth Clubs (London Youth)</b>	
If the organisation is part of a larger organisation, what is its name? <b>N/A</b>	
Address for correspondence: <b>47-49 Pitfield Street London</b>	
Postcode: <b>N1 6DA</b>	
Is this your home address? <b>No</b>	
Contact person: <b>Mr Marlon Gibbins</b>	Position: <b>Environmental Action Officer</b>
Phone: <b>020 7549 8817</b>	Fax: <b>020 7549 8801</b>
E-mail: <b>marlon.gibbins@londonyouth.org.uk</b>	
Website: <b>www.londonyouth.org.uk</b>	
Legal status of organisation: <b>Registered Charity</b>	
If registered, please give charity number: <b>303324</b>	
Date organisation established: <b>20/11/1962</b>	

### 2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? <b>London's Environment</b>
Purpose for which funds are requested: (25 words maximum) <b>To enhance young Londoners' knowledge and appreciation of the natural environment and to inspire them to become environmental advocates throughout London.</b>
How much funding is requested? <b>Year 1: £0 Year 2: £0 Year 3: £57,786 Total: £57,786</b>

### 3. Aims of your organisation

London Youth is a vibrant network of more than 400 community organisations serving 75,000 young people and their families across the capital.

Our vision is unashamedly bold: it is of a great world city in which every young person, whatever their background, is valued and challenged to become the best they can be. Our mission is simple: to improve services and opportunities for young people.

We want everyone growing up in and around London to enjoy access to high quality youth work - someone to talk to, information and guidance and life-enriching activities - all within a safe, stimulating and supportive environment. We work with young people in all their brilliant diversity, placing a particular emphasis on those who might be in any way disadvantaged or at risk of being excluded.

### 4. Main activities of your organisation

We work to support 75,000 young people in every London borough, placing a particular emphasis on those that are disadvantaged or at risk.

We help community-based youth clubs and youth workers increase their effectiveness - supporting them with information, accredited training and face-to-face guidance.

We work directly with young people to create opportunities that a single member organisation could not - for example our tried and tested Youth Action model brings young people together from all backgrounds to design, lead and learn from their own initiatives, accentuating the positive impact they can have on their communities. And at our two outstanding residential centres in the Chilterns and the Ashdown Forest we give young Londoners a unique experience of the benefits of the natural environment.

We advocate on behalf of our members so that the daily experience of on-the-ground practitioners informs the thinking of policy makers and funders.

### 5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
<b>70</b>	<b>25</b>	<b>13</b>	<b>960</b>

### 6. How do you support your volunteers?

London Youth has a strong tradition of creating rewarding volunteer opportunities within our organisation and within our membership network.

Our Volunteer Coordinator is responsible for creating sustainable accredited volunteer roles, for both individuals and corporate organisations, and supporting them through their volunteering journey with us.

### 7. Property occupied by your organisation

Is the main property owned or leased/rented by your organisation?	If leased/rented, how long is the outstanding lease/rental agreement?
<b>Owned</b>	<b>N/A</b>

## 8. Finance

From your most recent audited or independently examined accounts, complete the following:

Financial year ended:-

Month: 31 August

Year: 2012

<b>Income received from:</b>	<b>£</b>
Voluntary income	857,431
Activities for generating funds	38,269
Investment income	48,488
Income from charitable activities	3,301,052
Other sources	0
<b>Total Incoming Resources</b>	<b>4,245,240</b>

<b>Expenditure:</b>	<b>£</b>
Charitable activities	4,212,036
Governance costs	15,132
Cost of generating funds	120,543
Other	0
<b>Total Resources Expended</b>	<b>4,347,711</b>
<b>Net (Deficit)/Surplus:</b>	<b>(102,471)</b>
<b>Other Recognised Gains/(Losses)</b>	<b>51,277</b>
<b>Net Movement in Funds</b>	<b>(51,194)</b>

<b>Asset position at year end</b>	<b>£</b>
Fixed assets	7,623,857
Investments	1,054,114
Net current assets/(liabilities)	1,025,405
Long-term liabilities	0
<b>*Total A</b>	<b>9,703,376</b>

<b>Reserves at year end</b>	<b>£</b>
Unrestricted funds	8,347,644
Restricted funds	314,106
Endowment funds	1,041,626
<b>*Total B</b>	<b>9,703,376</b>

## 9. Statutory funding

For the financial year above, what % of your income was from statutory sources?  
10%

## 10. Material changes

Describe any material changes to the organisation's activities, structure or financial position since the date of the most recent accounts:

## 11. Previous applications to the Trust

Have you applied to the Trust before? If so, please give details:				
Month/Year:	03/10	Ref:	0	Grant received: £100,000 OR application rejected? No
Month/Year:	05/09	Ref:	0	Grant received: £135,000 OR application rejected? No
Month/Year:	02/07	Ref:	0	Grant received: £20,300 OR application rejected? No

## 12. Previous funding received

Funding received by your organisation from the following sources during the last <b>THREE</b> years: (i) City of London (other than the City Bridge Trust) (ii) London boroughs (iii) London Councils (formerly ALG) (iv) Health authorities (v) Central government departments (vi) Other statutory bodies (e.g. Housing Corporation, Arts Council) - List source, years and annual amounts:			
	Year: 2009	Year: 2010	Year: 2011
(i)			
(ii)	LB Enfield LB Greenwich LB Barking & Dagenham		10,000 3,735 10,000
(iii)			
(iv)			
(v)	Dept Education Dept Work & Pensions	832,915 296,556	312,820 491,283 1,700 1,950
(vi)	GLA LDA	315,337	30,000 180,737

## 13. Previous grants received

Grants received by your organisation from charitable trusts and foundations (other than the City Bridge Trust) during the last <b>TWO</b> years. List source, years and annual amounts:		
	Year: 2010	Year: 2011
John Paul Getty Charitable Trust	50,000	50,000
Big Lottery Fund		164,188
The Girdlers' Company	40,000	40,000
Jimmy Dixon Trust	30,000	30,000
John Ellerman Trust	25,000	25,000
Walcott Foundation	60,000	30,000

## 14. What steps is your organisation taking to reduce its carbon footprint?

Through a combination of the young people's projects and initiatives at the centres there has been a noticeable reduction in their carbon footprint. Urban Nature has also influenced our Quality Mark framework. Member clubs are now required to carry-out an environmental audit of their centre, as well as developing a robust environmental policy.

We have renewed the roof at our London office, increasing the insulation and reducing heat loss, and have upgraded our central heating boiler to a new condensing boiler.

Our two outdoor education centres are continuing to place a strong emphasis on sustainability. Hindleap Warren, as part of their carbon off-setting scheme, have recently installed solar panels and TRV's, and are conducting a feasibility study for a biomass boiler. Woodrow High House, through the on-going capital appeal, has undertaken carbon emission reduction measures and is planning modifications to the existing energy installations.

## 15. Purpose

Complete this section whatever the amount of grant requested. **In addition**, if the request is for £25,000 or more in total, a fuller proposal should be sent with this form. Also, if your application is for all or part of new or existing post(s), please enclose a copy of the relevant job description(s) including the salary level.

**In order to provide the right information, please refer to guidance note 15 before completing this section.**

Following the past 18 months of working collectively with young people and youth workers on developing their own environmental initiatives, it has become clear that there is a need and desire for this type of positive opportunity. During its first year, many of the Urban Nature projects developed exceeded our expectations and became an integral part of the provisions being offered at the participating youth organisations.

The resulting impact demonstrated that both the young people and youth workers had acquired sufficient knowledge and confidence to independently take forward their projects, but at the same time identified that there were individual needs that would further support their learning and development.

Through direct consultations with a cross-section of young people and youth workers there was a general consensus that those who had taken on the leadership roles within their projects would benefit greatly from further training opportunities, enabling them to both scale-up and replicate what they had achieved, to become advocates not only in their youth centres, but in the wider community.

For the third year we propose to continue to build upon the successes of our Urban Nature programme by giving 120 more young people from three additional youth organisations the opportunity to participate in our established programme, by getting them to design, lead and then evaluate their own environmental projects. Alongside this we will re-visit eight projects from the previous two years where we will facilitate a more intensive training programme for 24 young people that will support them in developing their environmental knowledge and confidence.

To further the overall impact of our learning, each individual group will contribute towards the production of an environmental resource, either in the form of a booklet or documentary, that will be distributed to other youth groups and schools across London, with the aim of reaching a further 480 young people.

In partnership with Capel Manor College, our aim is to develop an accredited introductory level environmental training programme that would both recognise the progress of the young people and offer them a variety of challenges, and ultimately provide them with a platform from which they could progress onto further qualifications in environmental studies.

Our main objectives for the programme in Year 3 are:

1) To improve young Londoners' quality of life by inspiring them about nature, enabling them to understand, appreciate and experience the natural environment.

We have a strong track record of educating young people about the natural environment and helping them understand that the lessons they learn about nature are relevant to their everyday lives. This project will build on our successes in this area and enable young Londoners to experience the many benefits of engaging with and contributing to the quality of their environment.

2) To contribute to the sustainable improvement of London's open spaces by reducing the carbon footprint of London's youth organisations and by raising awareness about the impact of the carbon footprint among young Londoners.

We plan for the environmental benefits of this project to be cascaded from direct participants (individuals and organisations) to hundreds of others and to be sustained well beyond the period of funding.

3) Young people are better equipped to become environmental leaders within their youth club and community.

London Youth has an established track record of delivering training and developing leadership skills among young people. By enhancing the learning experience and building upon what the young people have already learnt we are confident that this will provide a long lasting legacy.



**16. Explain how you will monitor and evaluate both your own outcomes and those of the programme under which you are applying.**

London Youth has a thorough yet uncomplicated approach to monitoring and evaluation. Alongside the experiences from the first year of Urban Nature we have developed an effective, yet simple, impact assessment framework which has been fine-tuned to capture the richness and variety of projects initiated by the young people.

We will be measuring progress throughout the year against 16 environmental indicators and 9 personal indicators.

We are constantly extracting key statistics, stories and evidence, and adapting the material to interest and influence different audiences. The projects that were developed during the first year of Urban Nature have since captured the imagination of other groups interested in participating.

We pass on our message to the generic youth press and policy forums in order to ensure our lessons are shared as widely and inclusively as possible.

We are always keen to learn from and share what does and doesn't work.

**17. Beneficiaries**

How many people will benefit from the grant per year?

**624**

In which local authority is your organisation based?

**Hackney**

Which borough(s) of Greater London will benefit from this grant?  
(if more than one, please give % for each)

**The project will be delivered in 11 of our member clubs across London, with 3 new clubs participating and an educational resource pan-London.**

At what address will the activity be located?

**The programme will be delivered at Hindleap Warren, our Hackney office and the sites where the member organisations are based.**

What age group will benefit? **Over 11 years, over 16 years**

What will the ethnic grouping(s) of the beneficiaries be?

	%		%
White - British	<b>35</b>	Black - Caribbean	<b>8</b>
White - Irish	<b>2</b>	Black - African	<b>11</b>
White - Other (please describe)		Black - Other (please describe)	
Asian - Indian	<b>2</b>	Black - British	<b>14</b>
Asian - Pakistani	<b>2</b>	Chinese	
Asian - Bangladeshi	<b>10</b>		
Asian - Other (please describe)		Other (please describe)	
		Mixed background	<b>16</b>
			Open to everyone

What proportion of the beneficiaries will be disabled people?

**10%**

## 18. Funding required for the project

What is the total cost of the proposed activity/project?  
(List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Project Coordinator salary			31,581	31,581
Management support			7,105	7,105
Support costs (IT, Finance, HR, Comms)			6,500	6,500
Residential costs			4,000	4,000
Accreditation			1,500	1,500
Project costs			1,800	1,800
Project marketing and materials			3,200	3,200
Staff travel			1,000	1,000
Volunteer and Young people's travel			600	600
Staff training			500	500
<b>TOTAL</b>			<b>57,786</b>	<b>57,786</b>

What income has already been raised? (List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
<b>TOTAL</b>				

What other funders are currently considering the proposal?

Funder	£
<b>TOTAL</b>	

## 19. Funding requested from the Trust

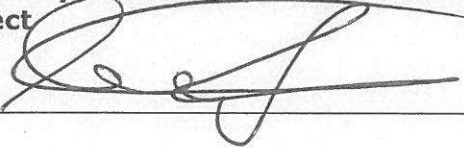
How much is requested from the Trust? (List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Project Coordinator salary			31,581	31,581
Management support			7,105	7,105
Support costs (IT, Finance, HR, Comms)			6,500	6,500
Residential costs			4,000	4,000
Accreditation			1,500	1,500
Project costs			1,800	1,800
Project marketing and materials			3,200	3,200
Staff travel			1,000	1,000
Volunteer and Young people's travel			600	600
Staff training			500	500
<b>TOTAL</b>			<b>57,786</b>	<b>57,786</b>

## 20. Funding requested from the Trust (continued)

When will the funding be required? <p style="text-align: center;"><b>01/04/2013</b></p>
Is the activity to continue beyond the period for which funding is requested? If so, how will it be resourced? <b>London Youth has developed strong partnerships with a number of corporate organisations as part of the Urban Nature programme as well as making links with the Big Lottery Fund. Our fundraising contingency is based on utilising the skills of our experienced fundraising team to secure income from other sources to continue the development of the programme.</b>
If any planning or other statutory consents are required for the project to proceed, what stage have the applications reached? <b>N/A</b>

### Declaration on behalf of applicant organisation

I, <u>Rosie Ferguson</u> (your name)
am an authorised representative of <u>London Youth</u> (your organisation)
within which I am <u>Chief Executive</u> (your position)
<b>To the best of my knowledge, all the information that I have provided in this application form is correct</b>
Signature <u></u> Date <u>3/1/13</u>

**Return the completed form to: The City Bridge Trust**  
City of London  
PO Box 270  
Guildhall  
London EC2P 2EJ

**Please**

- **do not send this application by fax or e-mail** – unless applying online, applications must be posted to the Trust
- **do send the information in the checklist** – if items are missing, your application will be returned to you
- **do send only the information in the checklist** – if further information is required, we will contact you
- **do ensure you have signed and dated this form** – we cannot accept forms which have not been signed and dated
- **do use the correct postage** – the completed form and additional materials are likely to exceed 100g in weight

**MEETING: 18/04/2013**

**ANNEX NUMBER: 8**

**ASSESSMENT CATEGORY - Older Londoners**

**Age UK Enfield**

**Ref: 11589**

**Amount requested: £97,586**

**Adv: Joan Millbank**

**Base: Enfield**

**Benefit: Enfield**

**Purpose of grant request:** To sustain our proven community-based Active Life Centre and Outreach service.

**Background**

Age UK Enfield (AUE) is a local charity working to promote the independence and wellbeing of older people and their carers living in Enfield. Enfield is the fifth largest London borough and has a very high proportion of pension credit recipients. AUE is the lead provider of older people's services in the borough. Activities include an information and advice service, dementia support, Home from Hospital service, foot care clinics, day care activities, intergenerational projects and a trading service in over-50's products. AUE participates on a number of strategic fora and partnerships to inform policy development at a local, regional and national level. It is affiliated to the Age UK federation.

**Funding History**

In 2007 you awarded a three year grant of £112,500 to provide a fit-for-life programme for older people in Enfield. The final monitoring report was deemed as 'good'.

**Current Application**

A three year grant is sought to help AUE sustain its outreach service that currently operates through four Active Life Centres and a home befriending service. Running costs towards the Freezywater Active Life Centre are also being sought.

The part-time Manager (20 hours per week) is responsible for planning and delivering the outreach services. The provision includes a one day per week day support service run from each of four local community centres. Activities include age-appropriate exercise, games, conversation, and speakers on health and wellbeing issues. Other AUE services are also available including benefits advice and nail clipping service. Two centres provide a freshly cooked affordable hot meal. Trained volunteers – mostly active older people – provide essential practical and informal befriending support within each club setting. Freezywater is located in one of the most deprived parts of Enfield (as identified in Enfield Older People's Profile 2012) and attracts 70 regular users each Friday between 10.30am and 2.30pm. Running costs sought include room-hire charges, volunteer expenses and contribution to core organisational costs. The Befriending

Service provides home visits to the most vulnerable and isolated older people, plus a telephone contact service.

Older people benefiting from these services are aged over 50 years, with 80% aged 75 years plus and living alone. For many users, the day at the Active Life Centre is their only time away from home. Older people can self-refer or are referred by agencies because they are isolated, vulnerable and/or suffer some form of mental ill-health. Over 40% are drawn from Enfield's diverse range of BAME communities. User surveys demonstrate a high level of satisfaction with the services provided. Benefits include feeling less lonely and less isolated, improved health and wellbeing, improved access to other services available in the borough.

### **Financial Observations**

The audited accounts for the year ended 31<sup>st</sup> March 2012 show income of £1,256,469 and an end-of-year surplus of £143,719 (11.4% turnover). The reserve policy does not state a target level of free unrestricted reserves which should be held but notes that the charity has a current holding of £511,088 (equivalent to 5.5 months' worth of total expenditure) which the Trustees consider to be insufficient and that they are looking at ways of increasing free reserves. A target reserve for inclusion in the reserves policy is also under discussion by the trustees.

Projected income for the year to 31<sup>st</sup> March 2013 is on course with all grants and contracts secured; a surplus of £24,000 is expected, of which approximately 50% should be free unrestricted funds.

The 2013-14 budget shows estimated income of 1,141,261 and expenditure of £1,095,845, resulting in an end of year surplus of £45,416, of which £28,600 relates to free unrestricted funds. The introduction of Personal Budgets is anticipated to produce income of £208,297 (18% of budget income), whilst £320,603 (28% of budget income) is expected from London Borough of Enfield which is a fall of £173,107 (35%) compared to the grant received in the prior year of £493,710. Other grant income secured to date amounts to £168,230 (15% of budget income). Income from other user fees and donations is expected to increase by £47,836 (12%) to £437,379 (38% of budget income).

### **Officer's Appraisal**

Active Life Centres offer a lifeline to isolated and vulnerable older Enfield residents. Trained volunteers help AUE to provide this unique borough service in a user-friendly and cost effective way. The Befriending Service complements the outreach service to provide holistic support. The combined service is at risk because of severe financial restraints on health and local authorities, and because local GP commissioning for older people's services is not fully in place in the borough. A three year grant

would secure the outreach service and the activities offered at Freezywater. 250 isolated and vulnerable older people would benefit.

**Recommendation**

**£97,500 over three years (£32,000; £32,500; £33,000) towards the salary cost of the part time (20 hpw) Outreach Service Manager and towards the running costs at the Freezywater Active Life Centre.**



# The City Bridge Trust

Charity Registration Number: 1035628

## Working with Londoners: Application for a grant

Please read the guidance notes before completing this form

Reference:  
(office use only)

11589

Date Received:

17/12/12

Programme  
Area:

5

### 1. About your organisation

Name of organisation applying for grant: <b>Age UK Enfield</b>	
If the organisation is part of a larger organisation, what is its name? <b>n/a</b>	
Address for correspondence <b>Unit 2, Vincent House, 2E Nags Head Rd, Ponders End, Enfield, London</b>	
Postcode: <b>EN3 7FN</b> Is this your home address? <b>No</b>	
Contact person: <b>Ms Lisa Seagroatt</b>	Position: <b>Community Services Director</b>
Phone: <b>020 8375 4120</b>	Fax: <b>020 8375 4138</b>
E-mail: <b>lisa.seagroatt@ageukenfield.org.uk</b>	
Website: <b>www.ageuk.org.uk/enfield</b>	
Legal status of organisation: <b>Charity</b>	
If registered, please give charity number: <b>1063696</b>	
Year and month organisation established: <b>1985, April</b>	

### 2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? <b>Older Londoners</b>
Purpose for which funds are requested: (25 words maximum) <b>To sustain our proven community-based Active Life Centre service, its management, extensive volunteering, and links to wider opportunities for isolated older people in Enfield borough</b>
How much funding is requested? <b>Year 1: £31,887 Year 2: £32,525 Year 3: £33,174</b> <b>Total: £97,586</b>

### 3. Aims of your organisation

Age UK Enfield is an independent local charity and Age UK brand partner. Our mission is to work with the diverse community of older people and their carers living in the Borough of Enfield to promote their independence, wellbeing and quality of life. We aim to: enable older people to make positive lifestyle choices, and to remain healthy, active and independent; provide opportunities that make a difference to older people's lives; develop programmes that enable older people to volunteer; and, link with local government initiatives and national policies. We engage over 200 volunteers p.a., supporting some of the Borough's most marginalised, disadvantaged and vulnerable (including over 40% BME). We have a substantial track record of effective service delivery, developed in response to expressed and identified needs, and of working in partnership with others.

### 4. Main activities of your organisation

Age UK Enfield is the main focus within the London Borough of Enfield in relation to service delivery, strategic engagement and community participation by and for older people. Services are provided across the borough, although with a particular focus on one or more deprived easterly wards within which Age UK Enfield is based. Activities include: Fit for Life keep fit sessions; Information & Advice service; dementia services including daycare and respite; Home from Hospital support; Footcare clinics; Active Life Centres drop-in; Befriending; Intergenerational projects; and trading in over 50s products. Services usually operate daily, and at least weekly. Age UK Enfield has an impressive array of sustained engagements in strategic forums and local delivery partnerships and networks, and regularly informs strategy and policy development locally, regionally and nationally.

### 5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
10	60	11	240

### 6. How do you support your volunteers?

We have comprehensive volunteer policies and procedures, and an associated Volunteers Handbook. We have been awarded the Investors in Volunteers Standard showing commitment to best practice in supporting volunteers, including ongoing development.

### 7. Property occupied by your organisation

Is the main property owned or leased/rented by your organisation?	If leased/rented, how long is the outstanding lease/rental agreement?
Leased	45 years



## 8. Finance

From your most recent audited or independently examined accounts, complete the following:

Financial year ended -

Month: **March**

Year: **2012**

<b>Income received from:</b>	<b>£</b>
Voluntary income	122,584
Activities for generating funds	37,358
Investment income	1,471
Income from charitable activities	1,095,056
Other sources	0
<b>Total Income</b>	<b>1,256,469</b>

<b>Expenditure:</b>	<b>£</b>
Charitable activities	1,100,833
Governance costs	11,917
Cost of generating funds	0
Other	0
<b>Total Expenditure</b>	<b>1,112,750</b>
<b>(Deficit)/surplus for the year:</b>	<b>143,719</b>

<b>Asset position at year end</b>	<b>£</b>
Fixed assets	9,572
Investments	0
Net current assets	537,697
Long-term liabilities	0
<b>*Total A</b>	<b>547,269</b>

<b>Reserves at year end</b>	<b>£</b>
Endowment funds	0
Restricted funds	26,609
Unrestricted funds	520,660
<b>*Total B</b>	<b>547,269</b>

\* Total A and Total B must be the same and should be taken from your balance sheet

## 9. Statutory funding

For the financial year above, what % of your income was from statutory sources?  
55%

## 10. Material changes

Describe any material changes to the organisation's activities, structure or financial position since the date of the most recent accounts:

No changes

## 11. Previous applications to the Trust

Have you applied to the Trust before? If so, please give details:						<input checked="" type="checkbox"/>
Month/Year: Apr	/ 2008	Ref: 8061	Grant received: £112,500	OR application rejected	<input type="checkbox"/>	
Month/Year: -	/ -	Ref:	Grant received: £	OR application rejected	<input type="checkbox"/>	
Month/Year: -	/ -	Ref:	Grant received: £	OR application rejected	<input type="checkbox"/>	

## 12. Previous funding received

Funding received by your organisation from the following sources during the last **THREE** years:  
**(i)** City of London (other than the City Bridge Trust) **(ii)** London boroughs **(iii)** London Councils (formerly ALG)  
**(iv)** Health authorities **(v)** Central government departments **(vi)** Other statutory bodies (e.g. Housing Corporation, Arts Council) - List source, years and annual amounts:

	Year: 2009	Year: 2010	Year: 2011
(i) City of London	0	0	0
(ii) LB Enfield	546,362	601,844	541,289
(iii) London Councils	11,955	11,955	4,467
(iv) Health authorities	148,750	148,749	149,749
(v) Government Depts	0	0	0
(vi) Other statutory	28,058	30,758	29,354

## 13. Previous grants received

Grants received by your organisation from charitable trusts and foundations (other than the City Bridge Trust) during the last **TWO** years. List source, years and annual amounts:

	Year: 2010	Year: 2011
Big Lottery	81,112	20,431
Community Development Foundation	0	7,809
EON	0	0
Age UK	11,158	80,752
NB Years above are start of finance		
yr ie 2011 = 11/12		

## 14. What steps is your organisation taking to reduce its carbon footprint?

Age UK Enfield applies ISO 19011 Quality and Environmental Management Systems Auditing across all of its services, activities and Centres. All managers have received training in this regard within the current year. Consideration of our environmental impact is a central value within the day-to-day management of the organisation. Recycling is implemented and encouraged at each of the venues from which we deliver services. Managers, working with staff and volunteers ensure consideration and review of resource use and that there is no unnecessary wastage, for example in our management of food at the Active Life Centres. Facilities audits take into consideration heating and lighting costs and managers responsible for each building are required to implement measures which lead to energy savings. Environmental issues are also discussed with clients who raise for example anxieties about their recycling collections, and in relation to which we have organised presentations from external speakers.

## 15. Purpose

Complete this section whatever the amount of grant requested. **In addition**, if the request is for £25,000 or more in total, a fuller proposal should be sent with this form. Also, if your application is for all or part of new or existing post(s), please enclose a copy of the relevant job description(s) including the salary level.

**In order to provide the right information, please refer to guidance note 15 before completing this section.**

**Need:** Enfield is the 5th largest London borough. It has the 46th highest proportion of pension credit recipients of all local authority areas in England. The proportion aged 55+ who participate in 3 x 30 minutes physical activity is 10.9%, compared to an England average of 13.3%. Projections of those 65+ living alone in is 37%. Freezywater Active Life Centre is located on the boundary between its Turkey Street and Enfield Lock wards. These wards fall within the 20% most deprived nationally. Life expectancies for men and women are lower than Enfield averages. The wards sit at Enfield's furthest north east which "is home to some of London's poorest communities suffering from high unemployment, low skill base, low educational attainment and a higher than average level of benefit claimants and income deprivation which has a disproportionate affect on children and older people" (North East Enfield Area Action Plan 2012).

**Delivery:** The current bid is to secure our p-t Outreach Services Manager post (20 hrs) and to sustain the committed input of many enthusiastic volunteers, and also the running costs of our Freezywater Active Life Centre - which takes place in an accessible Parish Hall and is the most popular of the Centres - and also to secure our extensive partnership links with opportunities for local older people, including referral pathways. The Manager will seek to additionally secure one further Centre at least, and with volunteers' support to expand our Befriending and wider peer outreach activities to the most vulnerable and isolated. Activities at Freezywater take place weekly.

**Aim & Objectives:** The aim of our Centres is to improve the life quality of isolated older people in Enfield borough through connecting them with their local community and wider opportunities. Our objectives are to: reduce isolation, loneliness and depression; keep older people healthy & safe; facilitate wellbeing; a sense of belonging; raise levels of esteem; provide a network of people and relationships; a choice of activities and opportunities to meet other people; provide info about safety, public health, financial benefits and energy saving; relevant information and signposting to local services; weekly Active Life Centres in four locations in the borough; alert services to crises; signpost or arrange Dial-a-ride transportation if required; culturally sensitive and promote equal opportunities to all; a choice of fun, healthy or appropriate activities that facilitate social interaction and integration; guest speakers; facilitate attendees in selecting future activities appropriate to the group; freshly prepared nutritious meals from fresh ingredients at two Centres; volunteers support newcomers to feel welcomed and enable participation; arrange day trips and outings

**Targets:** 30 volunteers (up from 25) actively engaged at any one time, comprising 35 per annum. 80 clients weekly will attend Freezywater Active Life Centre (an increase on the current 70). In total, the bid will support 250 individuals p.a. (not including beneficiaries of Befriending). By providing the core around which will be seek to sustain additional Centres and expand Befriending, beneficiaries are likely to be many more.

**The Right Organisation:** Working with and for Enfield's older people for 27 years. Commitment is evidenced by our 240 volunteers. Our extensive partnerships and links and wider service provision also ensure that we are best placed to add value for local older people and wider stakeholders. Age UK Enfield has met several quality assurance standards (as listed in the Fuller Proposal).

**Meeting the Theme:** Over 80% of those accessing Centres are aged 75+. They weekly participate in social, cultural activities, and activities encouraging healthy lifestyles. Our large team of volunteers organises activities. Activities are targeted at areas of greatest disadvantage. Services and activities are devised with due consideration for those with dementia. Our Centres have been demonstrated to contribute effectively to the wellbeing of services through the range of activities provided.

**Good Practice:** Older people are present throughout Age UK Enfield, including comprising a majority of its Board and the majority of its volunteers. Many volunteers at the Centres over retirement age remain fit and healthy as a result of their participation. Volunteers jointly plan sessions alongside service users and the project managers on an ongoing basis. We have a very proactive approach to equalities and diversity. The projected proportion of those aged 50+ who are also BME was 23% in 2011. The organisation's beneficiaries are over 40% BME. A high proportion of service users have a disability and our sites are fully accessible. See response to Q14 regarding our Carbon Footprint.

**16. Explain how you will monitor and evaluate both your own outcomes and those of the programme under which you are applying.**

The Outreach Services Manager will be responsible for collecting monitoring data, including ensuring volunteers are capturing activity and outcome measures. Age UK Enfield has recently adopted CharityLog as its Database and Contact Management System. CharityLog is fully web-based, with users able to access it (with appropriate log-in) from wherever they are accessing the internet, ideal for a project with as many different locations as our Outreach Services. Its functions include Outcome monitoring and reporting. The Outreach Services Manager will ensure that relevant staff and volunteers are trained in CharityLog's use.

Indicators will be incorporated into project and individual work plans. Volunteers will be trained in the use and analysis of evaluation tools in relation to outcomes. They will be made aware of City Bridge Trust's Working With Londoners: Older People's Programme outcomes alongside our own - as provided in the current application. Two evaluation groups will also be held annually (one for volunteers, one for clients) to focus attention and review further progress in relation to aims and outcomes, and to refine delivery.

**17. Beneficiaries**

How many people will benefit from the grant per year? **250**

In which local authority is your organisation based?

**Enfield**

Which borough(s) of Greater London will benefit from this grant?  
(if more than one, please give % for each)

**Enfield**

At what address will the activity be located? **St George's Parish Hall,  
710 Hertford Road, Freezywater, EN3 6NR**

What age group will benefit? **In line with current activities, beneficiaries will be overwhelmingly (over 80%) aged 75 and over**

What will the ethnic grouping(s) of the beneficiaries be?

	%		%
White - British	<b>44</b>	Black - Caribbean	<b>12</b>
White - Irish	<b>6</b>	Black - African	<b>8</b>
White - Other (please describe) <b>Greek/Greek Cypriot</b>	<b>4</b>	Black - Other (please describe)	
Asian - Indian	<b>4</b>	Black - British	<b>12</b>
Asian - Pakistani	<b>1</b>	Chinese	<b>1</b>
Asian - Bangladeshi	<b>2</b>		
Asian - Other (please describe)		Other (please describe) <b>Turkish/Turkish Cypriot</b>	<b>6</b>
Open to everyone			

What proportion of the beneficiaries will be disabled people?  
**40%**

## 18. Funding required for the project

What is the total cost of the proposed activity/project?

(List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Outreach Services Manager (inc.NI,pensn)	22,546	22,996	23,456	68,998
Premises hire	7,828	7,985	8,144	23,957
Volunteer Expenses	5,069	5,170	5,273	15,512
Training	800	816	832	2,448
Postage	325	332	338	995
Printing & Publicity	620	632	645	1,897
Telephone	800	816	832	2,448
Insurances	1,199	1,223	1,247	3,669
Day Trip Transport	1,500	1,530	1,561	4,591
Contribution to core incl office costs	6,103	6,264	6,431	18,798
<b>TOTAL</b>	<b>46,790</b>	<b>47,764</b>	<b>48,759</b>	<b>143,313</b>

What income has already been raised?

(List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
Henry Smith Charity (awaiting decision)	14,902	15,239	15,585	45,726
<b>TOTAL</b>	<b>14,902</b>	<b>15,239</b>	<b>15,585</b>	<b>45,726</b>

What other funders are currently considering the proposal?

Henry Smith Charity are considering the matching (although not overlapping) bid in relation to our Befriending Project, also managed by the Outreach Services Manager and included above. This would fund the remaining 7 hours per week of the Manager's time.

## 19. Funding requested from the Trust

How much is requested from the Trust? (List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Outreach Services Manager (inc.NI,pensn)	17,231	17,576	17,927	52,734
Premises hire	7,828	7,985	8,144	23,957
Insurances	99	101	103	303
Telephone	600	612	624	1,836
Postage	325	332	338	995
Printing & Publicity	320	326	333	979
Volunteer Expenses	1,325	1,351	1,378	4,054
Contribution to Core in. Office Costs	4,159	4,242	4,327	12,728
<b>TOTAL</b>	<b>31,887</b>	<b>32,525</b>	<b>33,174</b>	<b>97,586</b>

## 20. Funding requested from the Trust (continued)

When will the funding be required? **April 2013**

Is the activity to continue beyond the period for which funding is requested?

If so, how will it be resourced? **AUKE has ongoing strategic planning processes and places much emphasis on sustainability and diversifying the funding base. Full integration within strategic and senior management planning will be ensured. We have built much support amongst our partners and it is hoped that once local funding opportunities improve, we will be able to translate local commitment, goodwill and support into financial support.**

If any planning or other statutory consents are required for the project to proceed, what stage have the applications reached? **Not applicable**

### Declaration on behalf of applicant organisation

I, **Lisa Seagroatt** (your name)

am an authorised representative of

**Age UK Enfield** (your organisation)

within which I am **Community Services Director** (your position)

**To the best of my knowledge, all the information that I have provided in this application form is correct**

Signature



Date **5/12/12**

**Return the completed form to: The City Bridge Trust**

City of London

PO Box 270

Guildhall

London EC2P 2EJ

Please

- **do not send this application by fax or e-mail** – unless applying online, applications must be posted to the Trust
- **do send the information in the checklist** – if items are missing, your application will be returned to you
- **do send only the information in the checklist** – if further information is required, we will contact you
- **do ensure you have signed and dated this form** – we cannot accept forms which have not been signed and dated
- **do use the correct postage** – the completed form and additional materials are likely to exceed 100g in weight

**ASSESSMENT CATEGORY - Older Londoners**

**Hestia Housing & Support**

**Ref: 11389**

**Amount requested: £50,000**

**Adv: Tim Wilson**

**Base: Southwark**

**Benefit: Ealing**

**Purpose of grant request:** Towards the costs of GP:Reconnect, a project improving the health and well-being of older Londoners and tackling isolation.

**Background**

Established in 1970 to support rough sleepers, today Hestia works across 20 London boroughs with over 2,000 people each year. The overall aim of the charity is to improve the quality of life of isolated and vulnerable Londoners, and it does this through a range of projects including: supported housing for women fleeing domestic violence; services for people with mental health issues; work with ex-offenders; and support for older people.

Hestia's services are delivered in collaboration with other health and social care agencies. The charity places a strong emphasis on volunteer involvement as well as peer-to-peer support in its project work.

**Funding History**

Hestia withdrew an application in September 2007, and submitted a revised proposal in time for approval at that month's Committee meeting. The charity received a 12-month grant for a project working with children affected by domestic violence. Subsequent monitoring was good, and the file was made historic some time ago.

**Current Application**

Hestia is part of a network of voluntary and statutory organisations working in Ealing that have a common interest in improved health and social care services. In 2011 this group examined the scale of need amongst older people in the borough, identifying that 60% lived alone, and that befriending services were stretched. For many of these older people, the GP surgery is the first place they turn for help and support, and it is with the support of local GPs that Hestia has developed a project designed to tackle social isolation amongst some of Ealing's most vulnerable older people.

Hestia seeks funding towards the cost of a new project called GP:ReConnect. The charity will engage a network of volunteers aged 60 plus, known as Community Navigators, who will then be linked to local GP

surgeries. With the assistance of these surgeries, volunteers will be matched with socially isolated older people. In addition to befriending support, Community Navigators will help their peers to access local services and take part in activities which offer them opportunities to make new contacts. Through tackling social isolation, the charity aims to improve the mental and physical wellbeing of 80 isolated older people in deprived parts of Ealing.

The charity has a strong track record of working with groups of volunteers, having run a befriending service for Tower Hamlets NHS and a project where older people mentor young women and children who have experienced domestic violence.

### **Financial Observations**

Accounts for the year ended 31<sup>st</sup> March 2012 show a surplus of £727,505 (4.8% of turnover), of which £483,862 related to unrestricted activity and £243,643 was on restricted funds.

Hestia's policy is to hold unrestricted free reserves of up to 6 months' operating costs, a target of £8,176,609 based on expenditure in the current year 2012-13. As at 31<sup>st</sup> March 2012 the charity held £6,550,000 (4.8 months' worth).

The charity anticipates a surplus of £404,104 in 2012-13, and a deficit of £493,757 in 2013-14. Both figures largely relate to unrestricted activity and, therefore, free reserves are unlikely to change significantly over the period.

### **Officer's Appraisal**

Hestia is a well-established social care organisation with a strong network of partners in Ealing. It has identified the need for the proposed work and enlisted the support of local GPs, who are well-placed to identify isolated older people. The project will benefit from Hestia's experience of running comparable support activities, and there is already an established process whereby the charity recruits, screens, trains and supports volunteers.

Hestia hopes to extend the project to other boroughs after the life of City Bridge Trust funding.

### **Recommendation**

**£50,000 over three years (£19,500; £19,000; £11,500) towards the salaries of a GP ReConnect Co-ordinator (12 hours per week) and a Volunteering Development Manager (3 hours per week) together with on costs; conditional on the charity raising the balance of funding from other sources.**





# The City Bridge Trust

Charity Registration Number: 1035628

## Working with Londoners: Application for a grant

Please read the guidance notes before completing this form

Reference:  
(office use only)

11389

Date Received:

20/09/12

Programme  
Area:

5

### 1. About your organisation

Name of organisation applying for grant: <b>Hestia Housing and Support</b>	
If the organisation is part of a larger organisation, what is its name? n/a	
Address for correspondence <b>Sovereign Court</b> 1st & 2nd Floors MAYA HOUSE <b>15-21 Staines Road</b> 134-138 BOROUGH HIGH STREET <b>Hounslow</b> <b>Middlesex</b> LONDON TW 28/3/13	
Postcode: <del>TW3 3HR</del> SE1 1LB Is this your home address? <b>Yes</b>	
Contact person: <b>Ms Helen Bedser</b>	Position: <b>Director of Performance and Development</b>
Phone: <b>0208 538 2959</b>	Fax: <b>020 8572 5617</b>
E-mail: <b>helen.bedser@hestia.org</b>	
Website: <b>www.hestia.org</b>	
Legal status of organisation: <b>Registered Charity and Company Limited by Guarantee</b>	
If registered, please give charity number: <b>294555</b>	
Year and month organisation established: <b>July 1970</b>	

### 2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? <b>Older Londoners</b>
Purpose for which funds are requested: (25 words maximum) <b>GP:Reconnect will reduce isolation &amp; improve the health &amp; well-being of older Londoners, by improving their access to volunteering opportunities and social &amp; educational activities.</b>
How much funding is requested? <b>Year 1: £19441.5 Year 2: £19041.5 Year 3: £11518.0</b> <b>Total: £50000</b>

### 3. Aims of your organisation

Vision: Empowering People, Changing Lives

Mission: To deliver high quality and empowering housing, support, protection and care services in partnership with service users and local communities, to groups including older people, victims of domestic violence, people with mental health needs, ex-offenders, people with HIV/AIDs and people with alcohol and/or substance misuse problems.

Values: Supportive; Caring; Client Focused; Dedicated; Principled

### 4. Main activities of your organisation

Our main activities are the provision of:

- Volunteer and community empowerment projects supporting service users and local people to get involved and make a difference in their local communities
- Community-based support and day services for vulnerable including older people
- Specialist housing projects providing safe and supportive accommodation to a range of vulnerable people including people who have experienced domestic violence, abuse, a stay in hospital or prison and homelessness

Last year we worked with over 1570 vulnerable people across our housing, support and day services and engaged over 2000 people in our volunteer and community empowerment projects.

Hestia hosts the Ealing Local Involvement Network which brings us into touch with large numbers of both active older people who are concerned about health and social care issues locally, as well as isolated older people who are often the recipients of these services.

### 5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
256	63	10	90

### 6. How do you support your volunteers?

Volunteers receive induction, training, supervision and recognition for their contribution. Hestia has adopted the Volunteers Management Charter and completed the Volunteers Management Health Check. We are working towards Investors in Volunteering.

### 7. Property occupied by your organisation

Is the main property owned or leased/rented by your organisation?	If leased/rented, how long is the outstanding lease/rental agreement?
Rented	10 months

## 8. Finance

From your most recent audited or independently examined accounts, complete the following:

Financial year ended -

Month: **March**

Year: **2012**

<b>Income received from:</b>	<b>£</b>
Voluntary income	239,263
Activities for generating funds	
Investment income	84,981
Income from charitable activities	14,779,169
Gain on investments	17,498
<b>Total Income</b>	<b>15,120,911</b>

<b>Expenditure:</b>	<b>£</b>
Charitable activities	14,280,788
Governance costs	75,167
Cost of generating funds	37,451
Other	
<b>Total Expenditure</b>	<b>14,393,406</b>
<b>(Deficit)/surplus for the year:</b>	<b>727,505</b>

<b>Asset position at year end</b>	<b>£</b>
Fixed assets	1,901,408
Investments	1,714,555
Net current assets	6,202,989
Long-term liabilities	
<b>*Total A</b>	<b>9,818,952</b>

<b>Reserves at year end</b>	<b>£</b>
Endowment funds	
Restricted funds	1,715,943
Unrestricted funds	8,103,009
<b>*Total B</b>	<b>9,818,952</b>

\* Total A and Total B must be the same and should be taken from your balance sheet

## 9. Statutory funding

For the financial year above, what % of your income was from statutory sources?  
58%

## 10. Material changes

Describe any material changes to the organisation's activities, structure or financial position since the date of the most recent accounts:

## 11. Previous applications to the Trust

Have you applied to the Trust before? If so, please give details:							<input checked="" type="checkbox"/>
Month/Year: Sep	/	2007	Ref: 8026	Grant received: £withdraw	OR application rejected	<input type="checkbox"/>	
Month/Year: Sep	/	2007	Ref: 8341	Grant received: £45000	OR application rejected	<input type="checkbox"/>	
Month/Year: -	/	-	Ref:	Grant received: £	OR application rejected	<input type="checkbox"/>	

## 12. Previous funding received

Funding received by your organisation from the following sources during the last **THREE** years:  
**(i)** City of London (other than the City Bridge Trust)**(ii)** London boroughs **(iii)** London Councils (formerly ALG)  
**(iv)** Health authorities **(v)** Central government departments **(vi)** Other statutory bodies (e.g. Housing Corporation, Arts Council) - List source, years and annual amounts:

	Year: 2009	Year: 2010	Year: 2011
(i) City of London	0	0	0
(ii) London Boroughs (various)	3151805.15	5032199.61	8014800
(iii) London Councils	0	0	0
(iv) Health Authorities	0	0	0
(v) Ministry of Justice (2 grants)	1240000	1240000	1240000
(vi)			

## 13. Previous grants received

Grants received by your organisation from charitable trusts and foundations (other than the City Bridge Trust) during the last **TWO** years. List source, years and annual amounts:

	Year: 2010	Year: 2011
Oak Foundation	0	121,413
Wandsworth Voluntary Grants	0	90607
Children in Need	0	53638
Kensington and Chelsea Voluntary	0	49938
Ealing Early Years	0	38000
Other grants (various)	99754	159,181

## 14. What steps is your organisation taking to reduce its carbon footprint?

Hestia has a Sustainability Policy which aims to raise awareness, educate and provide practical guidance to staff, students, service users, volunteers and others on sustainable working practices across the organisation. Each service has a Local Sustainability Action Plan which aims to identify and address any gaps in sustainable working practices. Service sustainability action plans are audited as part of our Internal Inspection Policy & Procedure.

Our on-line training programme "Environmental Awareness and Sustainability" is mandatory for all staff.

Hestia is committed to working with socially responsible suppliers. Any suppliers used are asked to provide details of their sourcing and sustainable policies and to demonstrate their commitment to ethical work practices.

## 15. Purpose

Complete this section whatever the amount of grant requested. **In addition**, if the request is for £25,000 or more in total, a fuller proposal should be sent with this form. Also, if your application is for all or part of new or existing post(s), please enclose a copy of the relevant job description(s) including the salary level.

**In order to provide the right information, please refer to guidance note 15 before completing this section.**

Older people are particularly vulnerable to social isolation (Age UK 2011). Social isolation adversely affects physical and mental health and well-being (Pitkala, K.H. et al. 2009). Involvement in educational and social activity groups is proven to significantly alleviate isolation in older people (Cattam M et al. 2005). Older people are the main users of GP services and the GP practice is often the first place an older person turns to for help and support. In Ealing there are 35,000 older people: 21,000 older people live alone and 3000 older people have depression (JSNA 2011).

As well as having needs, there is increasing recognition of the role older people can play in developing the personal capacity of others through volunteering projects. People who use Community Navigator services report that they were less socially isolated following the intervention (Windle G et al. 2008). The Ealing LINK, the Chair of the GP Commissioning Consortia, the Director of Public Health and the Joint Commissioning Manager for Older People services have all expressed their enthusiastic support for the project.

There are a number of small-scale home visiting services in parts of Ealing playing a crucial role in reducing isolation for the very frail and housebound older people. However there are also many other isolated older people who have lost confidence and/or lack awareness of social and educative groups available locally and need some support to gain knowledge and confidence to go out and meet others. Existing home visiting services for older people are delivered by professionals or volunteers, but not by design, other older people as peers. In our experience peer support is powerful because they have an ease of communication and a sense of empathy with other older people as well as credibility with the other older person.

GP:ReConnect will employ a volunteer coordinator who will recruit, train and support older people from the local community in Ealing to volunteer Community Navigators roles. Volunteer Community Navigators will be linked to GP practices in deprived areas of Ealing and provide support and information to socially isolated older people; helping them to access courses, clubs, groups, activities and social network building opportunities that exist locally.

Hestia has identified three key objectives from the Project:

- GP: ReConnect will deliver a GP-based volunteer community navigator service to 80 isolated older people in deprived parts of Ealing over 2.5 years; helping them to access advice, information, social and leisure clubs, courses, services, activities and groups and social network building opportunities that exist locally. Supporting them to become more physically and mentally active and increase their social networks; so reducing their sense of isolation and use of health services.
- GP: ReConnect will recruit, train and support 40 active older people from Ealing, over 2.5 years, to volunteer community navigator roles, who will support isolated older people in deprived parts of Ealing; harnessing active older people's time, energy and talents to make a difference to another older person's life and equipping active older people with new skills, social capital and a sense of well-being.
- GP: ReConnect will involve service users, volunteers, GPs, other statutory and community stakeholders in shaping the future delivery of the project, to demonstrate its value and effectiveness and potential for further replication and to ensure that the project is sustainable beyond the initial two years.

Hestia is the Host organisation to the Ealing Local Involvement Network, this brings us into touch with significant numbers of both active older people who are concerned about health and social care issues locally, as well as isolated older people who are often the recipients of these services. Hestia also provides a thriving Age Activity Centre for over 120 older people. The centre offers a range of social and learning-based activities that enrich older people's personal and practical skills and social networks. Hestia has a successful volunteering programme and we currently have 90 volunteers in a range of roles including mentors and befrienders.

**16. Explain how you will monitor and evaluate both your own outcomes and those of the programme under which you are applying.**

We will put the following monitoring processes into place:

- Establishing a project steering group which will meet monthly and use reflective practice to explore the areas of learning
- Conducting a survey with each older person before and after their involvement with the project using questions directly linked to the projects outcomes
- Providing staff and volunteers with an opportunity to reflect on their experience of the project
- Collecting equality and diversity monitoring statistics about the older people involved in the project

We will use the information gathered to evaluate the project internally, both during and after the project, to ensure that it is achieving its outcomes. We will also commission an independent external evaluator to rigorously evaluate the project and provide us with a robust body of evidence on its effectiveness.

**17. Beneficiaries**

How many people will benefit from the grant per year? **60**

In which local authority is your organisation based?

**London Borough of Hounslow**

Which borough(s) of Greater London will benefit from this grant?

(if more than one, please give % for each)

**London Borough of Ealing**

At what address will the activity be located? **Ealing Community Resource Centre (office base), GP surgeries in Ealing**

What age group will benefit? **60+**

What will the ethnic grouping(s) of the beneficiaries be?

	%		%
White - British		Black - Caribbean	
White - Irish		Black - African	
White - Other (please describe)		Black - Other (please describe)	
Asian - Indian		Black - British	
Asian - Pakistani		Chinese	
Asian - Bangladeshi			
Asian - Other (please describe)		Other (please describe)	
Open to everyone			<b>100</b>

What proportion of the beneficiaries will be disabled people?  
**This will depend on participants - the project will be open to all.**

## 18. Funding required for the project

What is the total cost of the proposed activity/project?

(List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
GP ReConnect Co-ordinator Salary	16715	16715	8356.8	41786.8
Volunteering Development Manager	7729	7729	3864.4	19322.4
Staff training and travel costs	334	334	166	834
Volunteer expenses	4160	4160	2080	10400
Office costs (IT, phone, post, print)	2032	2032	1015	5079
Office rent	2880	2880	1440	7200
Room Hire	1080	1080	540	2700
Insurance	167	167	83.57	417.57
Recruitment	400	0	0	400
Evaluation	0	0	2000	2000
Central management costs and services	3944	3944	1972	9860
<b>TOTAL</b>	<b>39441</b>	<b>39041</b>	<b>21518</b>	<b>100000</b>

What income has already been raised?

(List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
na				
<b>TOTAL</b>				

What other funders are currently considering the proposal?

We have applied to the Health and Social Care Volunteering Fund for a 50% contribution to the costs.

## 19. Funding requested from the Trust

How much is requested from the Trust? (List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
GP ReConnect Co-ordinator Salary	8357.5	8357.5	4178	20893
Volunteering Development Manager	3864.5	3864.5	1932	9661
Staff training and travel costs	167	167	83	417
Volunteer expenses	1601	1601	1040	4442
Office costs (IT, phone, post, print)	1016	1016	507.5	2539.5
Office rent	1440	1440	720	3600
Room Hire	540	540	270	1350
Insurance	83.5	83.5	41.8	208.8
Recruitment	400	0	0	200
Evaluation	0	0	1500	1500
Central management costs and services	1972	1972	1245	5189
<b>TOTAL</b>	<b>19441.5</b>	<b>19041.5</b>	<b>11518.0</b>	<b>50000</b>

## 20. Funding requested from the Trust (continued)

When will the funding be required? **January 2013**

Is the activity to continue beyond the period for which funding is requested?  
If so, how will it be resourced? **We are hopeful that over the course of the project we will be able to build a robust case for future support which can then be used to attract more funding from other voluntary and statutory funders. We believe that this project has the potential to be replicated nationally and will aim to replicate it in other areas where we have relevant services, as well as providing advice to other organisations.**

If any planning or other statutory consents are required for the project to proceed, what stage have the applications reached? **n/a**

### Declaration on behalf of applicant organisation

I, **Helen Bedser** (your name)

am an authorised representative of

**Hestia Housing and Support** (your organisation)

within which I am **Director of Performance and Development** (your position)

**To the best of my knowledge, all the information that I have provided in this application form is correct**

Signature



Date **17.09.2012**

**Return the completed form to: The City Bridge Trust**  
City of London  
PO Box 270  
Guildhall  
London EC2P 2EJ

Please

- **do not send this application by fax or e-mail** – unless applying online, applications must be posted to the Trust
- **do send the information in the checklist** – if items are missing, your application will be returned to you
- **do send only the information in the checklist** – if further information is required, we will contact you
- **do ensure you have signed and dated this form** – we cannot accept forms which have not been signed and dated
- **do use the correct postage** – the completed form and additional materials are likely to exceed 100g in weight



**ASSESSMENT CATEGORY - Positive Transitions to Independent Living**

**Kingston Centre For Independent Living**

**Ref: 11497**

**Amount requested: £133,653**

**Adv: Ciaran Rafferty**

**Base: Kingston**

**Benefit: Kingston**

**Purpose of grant request:** An independent support planning and brokerage service for people with learning or physical disabilities, sensory impairments or mental health needs in Kingston upon Thames.

**Background**

Kingston Centre for Independent Living (KCIL) has been around since 1968 and is a genuinely user-led organisation serving the needs of disabled people (and their families/carers). Its services currently comprise: general information and advice; support and advice for people who directly employ Personal Assistants to meet their care and support needs; welfare/benefits advice; administration of the local authority grants scheme for holidays for disabled people; and the regular production of a quarterly newsletter, the *Kingston Independent*. A new service (funded from reserves initially) will provide supported volunteering opportunities underpinning other core services.

**Funding History**

You have supported KCIL on two previous occasions. In 2002 you awarded £58,000 over two years for a Community Development Officer while in 2006 £105,000 over three years helped with a project to target services to people from BME communities. Both grants were satisfactorily monitored.

**Current Application**

This proposal is to provide specialist advice and assistance for people to manage their personal budgets, through a "support-brokerage" service. Members will be aware of the change from local authorities directly providing (or arranging) the day-to-day care needs of disabled people to the provision of personal budgets whereby the individual is given the money to make their own choices (the Personalisation Agenda). This better supports their independence of course but only where they are able to make informed decisions. Hence the need for brokerage services such as this which will provide independent advice and guidance to the budget-holder (ie not influenced by an actual or potential service provider). The project will also be open to those who are self-funding their care as their need for impartial, independent, advice is equally important.

The project will provide information and guidance on potential service providers; will help individuals structure and plan their care packages; assist people in their appeals for funds where they have a case; map local services and create an accessible database; and use the information and learning from contact with disabled people to inform and improve the services on offer. The organisation expects to support 200-250 service users over three years, where each case will have an average duration of 4-6 weeks – although the Support Broker will probably have some input into the reviews carried out by Care Managers roughly six weeks later.

### **Financial Observations**

Accounts for the year ending 31<sup>st</sup> March 2012 show a surplus of £22,942 which represents 8.5% of turnover. Free unrestricted reserves held at that point were £162,044 (just less than 8 months' total expenditure) against a policy to hold 3 months' worth (which would equal £61,657). Since 31<sup>st</sup> March 2012 the organisation has earmarked up to £80,000 of this £100k surplus on free reserves to cover several items (eg the pump-priming of a supported volunteering programme as referred to in the introduction above; the cost of possible redundancies and shortfall in core income should a major contract not be renewed in September 2013; and some funds allocated to the project at the heart of this application). The organisation intends to show these funds as formally designated in the audited accounts for 2012/13.

The latest forecast for the current year to 31<sup>st</sup> March 2013 shows an overall deficit of £13,593, whilst the budget for the following year 2013/14 shows a surplus of £9,876.

### **Officer's Appraisal**

KCIL has had support from the local authority for many years and it has been entrusted by them to manage the local authority's holiday grants scheme for disabled people. It is also highly regarded by its clients and is true to its values in being genuinely user-led. The Support Broker service at the heart of this application is much-needed and very important to ensuring that disabled people have independent and reliable advice on commissioning their various care services and other resources for their day-to-day needs.

### **Recommendation**

**£133,000 over three years (£45,000; £43,000; £45,000) for the salary of a full-time Support Broker and associated costs.**



# The City Bridge Trust

Charity Registration Number: 1035628

## Working with Londoners: Application for a grant

Please read the guidance notes before completing this form

Reference:  
(office use only)

11497

Date Received:

20 11 12

Programme  
Area:

6

### 1. About your organisation

Name of organisation applying for grant: <b>KCIL</b>	
If the organisation is part of a larger organisation, what is its name? <b>n/a</b>	
Address for correspondence <b>River Reach 31-35 High Street Kingston upon Thames Surrey</b>	
Postcode: <b>KT1 1LF</b>	
Is this your home address? <b>No</b>	
Contact person: <b>Ms Theo Harris</b>	Position: <b>CEO</b>
Phone: <b>020 8546 9603</b>	Fax: <b>020 8546 7947</b>
E-mail: <b>theo.harris@kcil.org.uk</b>	
Website: <b>www.kcil.org.uk</b>	
Legal status of organisation: <b>Charity and Limited Company</b>	
If registered, please give charity number: <b>06240260</b>	
Year and month organisation established: <b>1968</b>	

### 2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? <b>Positive transitions to independent living</b>
Purpose for which funds are requested: (25 words maximum) <b>An independent support planning and brokerage service for people with learning or physical disabilities, sensory impairments or mental health needs in Kingston upon Thames.</b>
How much funding is requested? <b>Year 1: £44,922 Year 2: £43,880 Year 3: £45,051</b> <b>Total: £133,653</b>

### 3. Aims of your organisation

KCIL aims to support disabled people (and people with long-term illnesses) to achieve inclusion and independence. We do this by:

- Providing quality support services that meet the needs of disabled people;
- Eliminating social and attitudinal barriers to the full inclusion for disabled people;
- Influencing the development of local and regional policy and campaigning on issues of national relevance;
- Working in partnership with like-minded organisations to achieve our goals;
- Creating a sustainable organisation by ensuring that all our work is fully funded; have a broad range of funding streams allowing us to invest in the development of new services which meet local needs;
- Raising our profile with disabled people, organisations in the voluntary and community sector, local business and with the general public.

### 4. Main activities of your organisation

Information & Advice - Telephone and drop-in service to provide disability related information and signposting.

Self-directed Support - Ongoing practical support and advice for people who directly employ Personal Assistants to meet their care and support needs. This fully comprehensive service includes training for PAs and disabled employers, ongoing support to manage direct payments including, monitoring and compliance.

Get ACTIVE - Affecting Change Through Inclusive Volunteer Engagement is a new participatory action project that will incorporate a number of small projects including peer support and information and signposting for the planned brokerage project.

Welfare Benefits Advice - Practical support and advice to disabled people applying for disability or other benefits and support with appeals and tribunals. Thei project will also enhance the brokerage service by providing options for income maximisation.

Holiday Grants - Administration of the local authority grant for disabled people.

Kingston Independent - a quarterly newsletter and the KCIL.org.uk website which attracts upto 1000 unique visitors each month.

### 5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
4	5	8	7

### 6. How do you support your volunteers?

We have developed a new Volunteering Project with a designated Volunteer Coordinator to ensure that all volunteers at KCIL receive a full induction, regular supervision and are encouraged and supported to take up training opportunities.

### 7. Property occupied by your organisation

Is the main property owned or leased/rented by your organisation?	If leased/rented, how long is the outstanding lease/rental agreement?
Lease/rented	1 year

## 8. Finance

From your most recent audited or independently examined accounts, complete the following:

Financial year ended -

Month: **March**

Year: ~~2011~~ **2012**

Income received from:	£
Voluntary income	265,876
Activities for generating funds	1,268
Investment income	342
Income from charitable activities	0
Other sources	1,817
<b>Total Income</b>	<b>269,303</b>

Expenditure:	£
Charitable activities	222,784
Governance costs	23,577
Cost of generating funds	0
Other	0
<b>Total Expenditure</b>	<b>246,361</b>
<b>(Deficit)/surplus for the year:</b>	<b>22,942</b>

Asset position at year end	£
Fixed assets	0
Investments	0
Net current assets	177,432 154,490
Long-term liabilities	0
<b>*Total A</b>	<b>177,432</b>

Reserves at year end	£
Endowment funds	0
Restricted funds	15,388
Unrestricted funds	162,044
<b>*Total B</b>	<b>177,432</b>

\* Total A and Total B must be the same and should be taken from your balance sheet

*Handwritten signature and date: 7/2/13*

## 9. Statutory funding

For the financial year above, what % of your income was from statutory sources?  
99%

## 10. Material changes

Describe any material changes to the organisation's activities, structure or financial position since the date of the most recent accounts:

At the October 2012 AGM the members agreed to the geographical change allowing us to provide services "in and around Kingston. This was registered in October with the Charity Commission and they have not notified us of any issues. Until April 2010, KCIL has paid out direct payments to disabled individuals on behalf of the local authority. Accounts for the year end March 2011 there residue of approx £0.5M paid out in the first quarter.

## 11. Previous applications to the Trust

Have you applied to the Trust before? If so, please give details:

Month/Year: *Apr March* / 2006 Ref: Grant received: £105,000 OR application rejected

Month/Year: - *Sept* / - *2002* Ref: Grant received: £ *58,000* OR application rejected

Month/Year: - / - Ref: Grant received: £ OR application rejected

## 12. Previous funding received

Funding received by your organisation from the following sources during the last **THREE** years:  
**(i)** City of London (other than the City Bridge Trust) **(ii)** London boroughs **(iii)** London Councils (formerly ALG)  
**(iv)** Health authorities **(v)** Central government departments **(vi)** Other statutory bodies (e.g. Housing Corporation, Arts Council) - List source, years and annual amounts:

	Year: 2009	Year: 2010	Year: 2011
(i) Royal Borough of Kingston	1,808,404	2,035,894	730,196
(ii) ,			
(iii)			
(iv)			
(v)			
(vi)			

## 13. Previous grants received

Grants received by your organisation from charitable trusts and foundations (other than the City Bridge Trust) during the last **TWO** years. List source, years and annual amounts:

	Year: 2010	Year: 2011
Wates Foundation	7,500	-
Donations	531	994

## 14. What steps is your organisation taking to reduce its carbon footprint?

In order to reduce our carbon footprint we take the following action:  
 KCIL operates an environment policy which has set out steps for reducing waste and conserving energy. We recycle or reuse as much material as possible. KCIL has recently  
 sWe reduce waste by recycling, reusing materials and ordering sustainable or recyclable products where possible.  
 -We reduce the amount of documents and e-mails printed, and encourage double-sided printing  
 -We reduce energy usage by turning off lights and equipment not in use, and not leaving equipment on stand-by unless absolutely necessary. All lights and most equipment are turned off overnight.  
 -We encourage staff and volunteers to travel by public transport or on foot, and share car journeys with colleagues when going on work business.  
 -We use local companies for deliveries of stationery and office products or equipment.igned up the Royal Borough of Kingston Green Pledge.

## 15. Purpose

Complete this section whatever the amount of grant requested. **In addition**, if the request is for £25,000 or more in total, a fuller proposal should be sent with this form. Also, if your application is for all or part of new or existing post(s), please enclose a copy of the relevant job description(s) including the salary level.

**In order to provide the right information, please refer to guidance note 15 before completing this section.**

We are applying under the 'Positive Transitions to Independent Living – Support for disabled people in managing independent living and 'personal budgets' theme. KCIL is a charity that promotes independent living for disabled people. We are unique locally in that we are the only user-led organisation to provide support to people with all disability types. We seek funding for 3 years to provide support brokerage to people in receipt of personal budgets as well as those who fund their own care. The overall aim of this service will be to give disabled people better choice and control over their day-to-day care by helping them to identify a wide range of support options and then setting up a suitable care package to help them live independently in their own homes. The project will be open to people with physical and learning disabilities, sensory impairments or mental health conditions. The Project aims to:

- Improve choice and control by offering a wide range of support options;
- Increase people's independence by supporting them to secure appropriate care and support to remain in their own home;
- Improve their ability to deal with problems and or disputes around their care by accessing Peer Support or tapping into advocacy support provided by KCIL or other agency;
- Improve their health and well-being, and increase social inclusion.

To achieve this we will employ a Support Broker to provide final support planning, brokerage and initial service set up. The Broker will also supervise volunteers, promote the service and monitor service outcomes. Based on figures from other boroughs, we expect to support 200-250 service users for time limited (up to six weeks) support planning/brokerage over the three year period.

The Support Broker will:

- Provide information, support and guidance to complete support plans
  - Set up support packages to meet assessed / identified need within a set budget.
  - Provide input to initial reviews of support packages carried out by Care Managers/Social Workers
- We will offer person-centred support brokerage to meet specific needs by providing one-to-one sessions, home visits and outreach work support over a period of 4-6 weeks. The service will also be able to refer people to other KCIL services such as peer support, benefits advice to maximise income, support to recruit, manager and train Personal Assistants, advocacy to deal with disputes and volunteering opportunities. Evidence from disabled people, RBK and other agencies show there is a need for this project as there are currently no independent support brokerage services in Kingston and this limits choice. Disabled people going through RBK in-house brokerage service have reported that some social care staff do not meet their specific needs which has made the process of applying for social care virtually impossible.

The council had aimed to have all social care users on personal budgets by April 2012 however this has proven difficult to achieve. There is also evidence from the Putting People First 'People who pay for care' Report that there is a direct link between government cuts and an increase in self-funders thus for a growing number of people our proposed project will be their only option for support planning and brokerage services. We will involve service users by actively seeking their feedback to help develop the project and service users will deliver some aspects of the service via the Peer Support Group. A number of representatives from other voluntary sector organisations have shown an interest in being on a project steering group.

KCIL operates a number of policies which ensure that all those who work for or with KCIL are not discriminated against and are given equal opportunities irrespective of their age, disability, race, gender, sexual orientation and religion or beliefs. KCIL ensures volunteers have clearer roles and are offered training and personal development opportunities; we invite volunteers to take part in developing our strategy.

(Full proposal details on continuation sheet). \* on file .

**16. Explain how you will monitor and evaluate both your own outcomes and those of the programme under which you are applying.**

All enquiries will be recorded to include action taken, details about service user, referrals to other services, type of disability, ethnic background, age so we get a picture of our client base. Each service user will have a case file with detailed information about their specific case, actions taken and a follow-up procedure; this will help us determine whether we are meeting clients' needs. Stakeholders will be asked for feedback (service users, their families/ carers, professionals, internal staff/ volunteers and social services colleagues); this will include quantitative and qualitative feedback so we know how effective the service is and make improvements or changes where it isn't. Quarterly reports will be produced for internal use (KCIL trustee board) and an annual impact report which shows the outcomes and well as areas for improvement. Finally, our Get ACTIVE reference group will play a part in reviewing the service. We will also adhere to our data protection and confidentiality policies.

**17. Beneficiaries**

How many people will benefit from the grant per year? **70 +**

In which local authority is your organisation based?  
**Kingston upon Thames**

Which borough(s) of Greater London will benefit from this grant?  
(if more than one, please give % for each)  
**Kingston upon Thames**

At what address will the activity be located? **River Reach, 31-35 High Street, Kingston upon Thames, Surrey, KT1 1LF**

What age group will benefit? **16+**

What will the ethnic grouping(s) of the beneficiaries be?

	%		%
White - British		Black - Caribbean	
White - Irish		Black - African	
White - Other (please describe)		Black - Other (please describe)	
Asian - Indian		Black - British	
Asian - Pakistani		Chinese	
Asian - Bangladeshi			
Asian - Other (please describe)		Other (please describe)	
Open to everyone			<b>100</b>

What proportion of the beneficiaries will be disabled people?  
**100%**



## 18. Funding required for the project

What is the total cost of the proposed activity/project?  
(List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Salaries including on-costs	39,947	29,815	30,709	100,471
Recruitment costs	2,300	-	-	2,300
Staff training and expenses	700	500	500	1,700
Volunteer training and expenses	3,100	3,178	3,258	9,536
Office costs and publicity	3,250	3,250	3,250	9,750
ICT costs	2,300	500	500	3,300
Building overheads contribution	3,500	3,605	3,713	10,818
Management & supervision	3,125	3,032	3,121	9,278
<b>TOTAL</b>	<b>58,222</b>	<b>43,880</b>	<b>45,051</b>	<b>147,153</b>

What income has already been raised?  
(List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
KCIL Reserves	13,300			
<b>TOTAL</b>				

What other funders are currently considering the proposal?

n/a

## 19. Funding requested from the Trust

How much is requested from the Trust? (List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
FT Support Broker	28,947	29,815	30,709	89,471
Recruitment	1,800			1,800
Volunteer training/expenses contribution	1,300	3,178	3,258	7,736
Office costs & publicity	3,250	3,250	3,250	9,750
ICT costs	2,300	500	500	3,300
Building contribution	3,500	3,605	3,713	10,818
Staff training	700	500	500	1,700
Management & supervision	3,125	3,032	3,121	9,278
<b>TOTAL</b>	<b>44,922</b>	<b>43,880</b>	<b>45,051</b>	<b>133,853</b>

## 20. Funding requested from the Trust (continued)

When will the funding be required? **Jan 2013**

Is the activity to continue beyond the period for which funding is requested?  
If so, how will it be resourced? **We anticipate that there will be an ongoing need for the work of the project beyond the funding period and so we will embark on fundraising strategy mid way through the three year period.**

If any planning or other statutory consents are required for the project to proceed, what stage have the applications reached? **N/A**

### Declaration on behalf of applicant organisation

I, **Theo Harris** (your name)

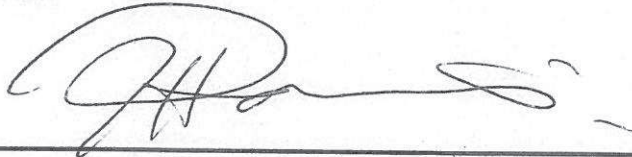
am an authorised representative of

**KCIL** (your organisation)

within which I am **Chief Executive Officer** (your position)

**To the best of my knowledge, all the information that I have provided in this application form is correct**

Signature



Date

**27.11.2012**

**Return the completed form to: The City Bridge Trust**

City of London

PO Box 270

Guildhall

London EC2P 2EJ

Please

- **do not send this application by fax or e-mail** – unless applying online, applications must be posted to the Trust
- **do send the information in the checklist** - if items are missing, your application will be returned to you
- **do send only the information in the checklist** – if further information is required, we will contact you
- **do ensure you have signed and dated this form** – we cannot accept forms which have not been signed and dated
- **do use the correct postage** – the completed form and additional materials are likely to exceed 100g in weight

**MEETING: 18/04/2013**

**ANNEX NUMBER: 11**

**ASSESSMENT CATEGORY - Positive Transitions to Independent Living**

**Muscular Dystrophy Campaign**

**Ref: 11618**

**Amount requested: £42,538**

**Adv: Ciaran Rafferty**

**Base: Southwark**

**Benefit: Several London boroughs**

**Purpose of grant request:** A work experience programme for young disabled people to enhance their work based skills, increase their self-confidence and improve their chances of finding employment.

**Background**

Muscular Dystrophy Campaign (MDC) was established in 1959 to improve the lives of people affected by muscle disease. Muscular dystrophy is an umbrella term for over sixty relatively rare and progressive muscle-wasting conditions for which there is currently no cure. Although the effects and related symptoms caused by muscle disease vary, the common trait is that those affected will be physically disabled and often reliant on others for their personal care. The charity's work is aimed at both improving the lives of people currently affected by muscle wasting conditions and at investing in research to establish cures and treatments for the future. One of the most impressive strands of MDC's work is in mobilising and supporting its 400 younger members (the *Trailblazers*) to successfully lobby and campaign for changes to services so that barriers to access are reduced. Current campaigns include "The Big Picture" which is helping cinemas cater more fully for disabled patrons. A group of Trailblazers also spoke to the Transport Select Committee in March to highlight both their concerns and their solutions on public transport.

**Funding History**

You have supported MDC on three previous occasions. In late 2001 you awarded £23,000 over two years for a Family Care Worker. You then, in May 2008, awarded £90,000 over two years for an Expert Patient Network for London, followed by a third year's support of £40,000 in September 2010. All grants were successfully monitored.

**Current Application**

This application is for a project targeting the 100 or so London-based Trailblazers. It recognises that these young people not only face barriers to employment but also to gaining work experience. Many potential host organisations are scared of what might be involved and focus too much on what the practicalities for them might entail rather than on what

benefits the young person might bring to their organisation. A limited pilot scheme is operating within MDC (an organisation of some 50 staff) which hosts someone on work experience. This has proved to be really successful and so the organisation wants to expand the in-house scheme to provide more opportunities across more departments. Each placement is personally tailored (related to their individual skills and aspirations) and is formally structured so that progress and impact measurement can be achieved. Complementary support (eg assisting with CV compilation) will also be provided. In addition, the scheme will work closely with other potential employers (some are already signed up) so that they become better able and more willing to take disabled young people on work experience.

### **Financial Observations**

Audited accounts for the year ended 31<sup>st</sup> March 2012 show a surplus of £424,000 (6.7% of turnover). At the year-end unrestricted free reserves stood at £369k equating to almost 1 months' worth of total expenditure (based on the 2013/14 budget). The charity has recently advised that it intends to increase unrestricted free reserves to £1.5m by 2015 - equivalent to 3.7 months' worth of total expenditure.

The forecast for 2012/13 shows an overall surplus of £549k (12.2% of turnover), which comprises a surplus of £599k on unrestricted activity and a deficit of £50k on restricted funds. Whilst an overall surplus is forecast for the year, income is estimated to total £4.488m which is a decrease of £1.8m (29%) on the previous year. This fall is largely due to a fall in fundraised income but also partly due to 2011/12 being the final year in which the organisation received additional income (£641k) from it being the 2009/10 Tesco Charity of the Year and due to a reduction of £205k (18%) in legacy income. The unrestricted funds surplus of £599k is forecast to increase free reserves to £968k - equivalent to 2.4 months' worth of expenditure.

The budget for the current year to 31<sup>st</sup> March 2014 shows income marginally increasing to £4.726m and an overall deficit of £147k. However, whilst this comprises a deficit on restricted funds of £508k, it also includes a surplus of £361k on unrestricted activity which should further increase free reserves to £1.329m - equivalent to 3.3 months' worth of expenditure.

### **Officer's Appraisal**

MDC's commitment to supporting and giving voice to disabled young people is exemplary while the work of the Trailblazers in bringing their needs to the attention of government and policy makers has been very effective. This project will provide much-needed and, sadly, all too rare opportunities for young disabled people - some of whom are graduates - to gain work experience. It will also endeavour to change the opinions and practices of other employers and organisations so that more

opportunities are made available in the future. With your funding the current in-house scheme will be expanded to offer experience in marketing, design, research, finance, HR, fundraising and corporate liaison.

### **Recommendation**

**£42,500 over two years (£21,000; £21,500) towards the salary and project costs of a work-experience programme for young disabled Londoners.**



# The City Bridge Trust

Charity Registration Number: 1035628

## Working with Londoners: Application for a grant

Please read the guidance notes before completing this form

Reference:  
(office use only)

11618

Date Received:

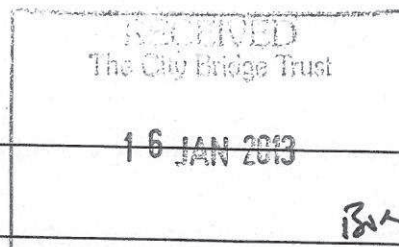
16/01/13

Programme  
Area:

6

### 1. About your organisation

Name of organisation applying for grant: <b>Muscular Dystrophy Campaign</b>	
If the organisation is part of a larger organisation, what is its name? <b>N/A</b>	
Address for correspondence <b>61 Southwark Street, London</b>	
Postcode: <b>SE1 0HL</b>	
Is this your home address? <b>No</b>	
Contact person: <b>Mr Peter Sutton</b>	Position: <b>Trust Fundraiser</b>
Phone: <b>0207 803 4818</b>	Fax: <b>0207 401 3495</b>
E-mail: <b>p.sutton@muscular-dystrophy.org</b>	
Website: <b>www.muscular-dystrophy.org</b>	
Legal status of organisation: <b>Registered charity</b>	
If registered, please give charity number: <b>205395</b>	
Year and month organisation established: <b>May 1959</b>	



### 2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? <b>Positive transitions to independent living</b>
Purpose for which funds are requested: (25 words maximum) <b>A work experience programme for young disabled people to enhance their work based skills, increase their self confidence and improve their chances of finding employment.</b>
How much funding is requested? <b>Year 1: £20,955 Year 2: £21,583 Year 3: £</b> <b>Total: £42,538</b>

### 3. Aims of your organisation

'Muscular dystrophy' is an umbrella term for 60, mainly genetic, conditions characterised by weakening and wasting of the muscles. All these conditions are serious and progressive, with effects ranging from mild to severe disability and premature death, typically in childhood or early adulthood. There are currently no cures for any of these conditions.

Founded in 1959, the Muscular Dystrophy Campaign (MDC) aims to achieve a world where muscle-wasting conditions are not a barrier to quality or length of life and do not lead to isolation, through research into treatments and cures, providing support services, raising awareness of the conditions, and funding specialist equipment. We are the only UK charity supporting all 60 conditions, working closely with the 70,000 adults and children living with the conditions across the UK, as well as the estimated 350,000 people indirectly affected as relatives and carers.

### 4. Main activities of your organisation

The charity's work is aimed at both improving the lives of people currently affected by muscle wasting conditions and investing in research to establish cures and treatments for the future. Programmes of work include our Information Service, which handles over 6,000 queries a year and provides expert materials on condition management and care advice. We also operate a rapidly growing Advocacy Service, which since 2011 has secured over £1million worth of essential statutory support for people with severely disabling conditions. Such support can dramatically improve health outcomes and independent living.

In order to facilitate peer to peer support, we run a number of beneficiary-led support and awareness-raising Community Support Networks across the UK as well as the Trailblazers, a campaigning and support network for young disabled people. We also support a range of pioneering research projects into treatments and cures and there is now a real possibility of developing treatments for some conditions within the next ten years.

### 5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
43	11	13	2562

### 6. How do you support your volunteers?

We have volunteers across the UK and provide them with a range of advisory material and frequent contact with our London based staff. Volunteers can fundraise and take part in campaigns as well as have the opportunity to work from our headquarters.

### 7. Property occupied by your organisation

Is the main property owned or leased/rented by your organisation?	If leased/rented, how long is the outstanding lease/rental agreement?
Rented	3.5 years

## 8. Finance

From your most recent audited or independently examined accounts, complete the following:

Financial year ended -

Month: **March**

Year: **2012**

<b>Income received from:</b>	<b>£</b>
Voluntary income	5,810,000
Activities for generating funds	79,000
Investment income	115,000
Income from charitable activities	299,000
Other sources	3,000
<b>Total Incoming Resources</b>	<b>6,306,000</b>

<b>Expenditure:</b>	<b>£</b>
Charitable activities	3,623,000
Governance costs	45,000
Cost of generating funds	2,214,000
Other	0
<b>Total Resources Expended</b>	<b>5,882,000</b>
<b>Net (Deficit)/Surplus:</b>	<b>424,000</b>
<b>Other Recognised Gains/(Losses)</b>	<b>21,000</b>
<b>Net Movement in Funds</b>	<b>445,000</b>

<b>Asset position at year end</b>	<b>£</b>
Fixed assets	182,000
Investments	2,950,000
Net current assets/(liabilities)	(436,000)
Long-term liabilities	(89,000)
<b>*Total A</b>	<b>2,607,000</b>

<b>Reserves at year end</b>	<b>£</b>
Unrestricted funds	596,000
Restricted funds	1,697,000
Endowment funds	314,000
<b>*Total B</b>	<b>2,607,000</b>

## 9. Statutory funding

For the financial year above, what % of your income was from statutory sources?  
0%

## 10. Material changes

Describe any material changes to the organisation's activities, structure or financial position since the date of the most recent accounts:  
From 1<sup>st</sup> April 2012, the Neuro Muscular Centre (a Cheshire-based subsidiary charity of the Muscular Dystrophy Campaign) became an independent charity.



## 11. Previous applications to the Trust

Have you applied to the Trust before? If so, please give details:				<input checked="" type="checkbox"/>
Month/Year: Oct Sept / 2010	Ref: 10034	Grant received: £40,000	OR application rejected	<input type="checkbox"/>
Month/Year: Oct May / 2007 <sup>2008</sup>	Ref: 8645	Grant received: £90,000	OR application rejected	<input type="checkbox"/>
Month/Year: Aug Nov. / 2001	Ref: 1564/AA	Grant received: £38,000	OR application rejected	<input type="checkbox"/>

## 12. Previous funding received

Funding received by your organisation from the following sources during the last **THREE** years:  
**(i)** City of London (other than the City Bridge Trust) **(ii)** London boroughs **(iii)** London Councils (formerly ALG)  
**(iv)** Health authorities **(v)** Central government departments **(vi)** Other statutory bodies (e.g. Housing Corporation, Arts Council) - List source, years and annual amounts:

	Year: 2009	Year: 2010	Year: 2011
(i) None			
(ii) None			
(iii) None			
(iv) National Health Service	£0	£82,997.75	£143,925.08
(v) None			
(vi) None			

## 13. Previous grants received

Grants received by your organisation from charitable trusts and foundations (other than the City Bridge Trust) during the last **TWO** years. List source, years and annual amounts:

	Year: 2010	Year: 2011
Below £1,000	76	81
£1,000-£4,999	35	37
£5,000-£9,999	10	15
£10,000-£99,999	9	10
1 x £250,000	0	1- G Weston
Total number of grants	130	150

## 14. What steps is your organisation taking to reduce its carbon footprint?

All our printers use a low ink resolution and, in order to save paper, we use double sided printing settings. We also use recycled paper in all of our printing. The charity has cycle parking facilities available at our premises to encourage staff to travel by alternative methods of transport. We have recently been given an award by the Paper Round BPR Group (a London based recycling company) for our recycling efforts over the last year, which has amounted to the equivalent of saving forty-one trees.

## 15. Purpose

Complete this section whatever the amount of grant requested. **In addition**, if the request is for £25,000 or more in total, a fuller proposal should be sent with this form. Also, if your application is for all or part of new or existing post(s), please enclose a copy of the relevant job description(s) including the salary level.

**In order to provide the right information, please refer to guidance note 15 before completing this section.**

Many young disabled people are as ambitious and as well qualified as their non-disabled peers. However, when it comes to obtaining work experience, many find themselves disadvantaged:

- Disabled people in their early 20s are twice as likely to not be in employment, education or training as non-disabled young people (Equalities and Human Rights Commission, 2010)
- 70% of Trailblazers are looking to enhance their CVs as they are currently students or unemployed (2011)
- 83% of Trailblazers have looked for work experience but half of these respondents have encountered serious difficulties in finding it (2012)

In response to this, we are setting up a pilot work experience project at MDC headquarters over two years, where beneficiaries can gain experience in Departments that closely match their interests, take part in CV and job application workshops and participate in peer-to-peer mentoring schemes. We will recruit participants from London-based Trailblazers, around 90% of whom have expressed clear interest in the scheme and view it as a 'stepping stone' to future employment. We will also be using links with NUS Diversity Officers at London Universities to publicise the scheme on campus and identify young disabled people who could benefit. We anticipate that the scheme will benefit around 30 young disabled people. Placements will typically be 1-3 months long but, as many young disabled people known to us are in Higher Education or do not have permanent access to a support worker, the timescale will be flexible. Home working will also be available if mobility or care issues mean people are unable to travel to the office. Participants will work closely with their allocated team/s to gain experience including research projects, liaising with clients, designing promotional materials, contributing to the MDC website and organising events.

As well as practical experience building the skills and confidence needed to obtain employment, we will deliver quarterly 'employability workshops', focussing on CV building, tips on job applications and advice on job hunting. These will be run by 4 Trailblazers working with firms in London, who have offered to participate in the scheme. We will also invite corporate representatives to visit our offices to meet participants and to address misconceptions about employing disabled people, such as concerns about the costs and difficulties of reasonable adjustments. We hope this will also present an opportunity to develop further links with corporates with a view to increasing the number of young disabled people taking up internships and offers of employment.

We have a proven track record of working with and delivering projects for young disabled people through our Trailblazers network. This has a membership of 475 from which a number of participants will be drawn for this project. Trailblazers staff will be responsible for this new project. The project will enable us to develop our programme of work for young people and, by also recruiting from outside the Trailblazers network, allow us to expand our reach.

As an organisation, we value and support our volunteers (see Q6), who come from a wide range of social and ethnic backgrounds and who play a key role in determining the campaigning topics and focus of our charity. We are also taking a number of steps to reduce our carbon footprint (see Q14). Our project closely meets the priorities set out in the 'Positive Transitions to Independent Living' programme. The transition to employment can be prolonged and difficult for disabled people, especially when their non-disabled peers may be quickly obtaining jobs and beginning careers. The targeted experience and support we will offer will help smooth this transition and mitigate some of the inequalities that these young people face when looking for work experience or employment.

The project will achieve the following objectives:

- Enable 30 young disabled people to gain the skills and confidence needed to find employment
- Equip attendees with the skills to produce high quality CVs and job applications.
- Increase companies' interest in offering young disabled people work experience/employment
- Increase the reported independence and confidence of 30 young disabled people, through equipping them to seek further work experience or paid employment.

**16. Explain how you will monitor and evaluate both your own outcomes and those of the programme under which you are applying.**

Quantitative data recorded throughout the project will include numbers taking part, number of company representative visits, workshops delivered and departments worked with. Participants will fill in an assessment form at the start of the placement, focusing on skills they wish to develop and how confident they feel about looking for work; this will form part of our baseline data. Progress will be monitored at regular mentor meetings throughout the placement and a final evaluation form completed at the end, giving each participant the opportunity to reflect on the skills they have developed and how useful they feel the experience has been to them overall. We will use these to record positive feedback and make a careful note of difficulties, which will help inform any changes we might make to project delivery. Participants will be asked to write an extended blog post after completing their placement, summarising the overall experience and skills they can take forward; and contacted every 2 months thereafter to monitor whether they are in employment, have applied for jobs, had interviews, or have accessed further work experience, and whether they feel their MDC placement has helped them in this. We will collect comments from corporate visitors on their visit's impact on their perceptions of disabled people in the workplace. Feedback from members of staff will also contribute to our evaluation, focusing on individual interns' performance. Monitoring data will be reviewed regularly and used to evaluate overall success in achieving project objectives - specifically growth in participants' skills and confidence, level of interest expressed by company representatives, and evidence gathered to support future employment /employability work.

**17. Beneficiaries**

How many people will benefit from the grant per year? <b>15</b>			
In which local authority is your organisation based? <b>Southwark Council</b>			
Which borough(s) of Greater London will benefit from this grant? (if more than one, please give % for each) <b>Recruitment for the project has not yet begun, but we anticipate boroughs to include Newham, Hackney, Hounslow, Barking &amp; Dagenham and Enfield</b>			
At what address will the activity be located? <b>61 Southwark Street, London,</b>			
What age group will benefit? <b>16-30</b>			
What will the ethnic grouping(s) of the beneficiaries be?			
	<b>%</b>		<b>%</b>
White - British		Black - Caribbean	
White - Irish		Black - African	
White - Other (please describe)		Black - Other (please describe)	
Asian - Indian		Black - British	
Asian - Pakistani		Chinese	
Asian - Bangladeshi			
Asian - Other (please describe)		Other (please describe)	
Open to everyone			<b>Yes</b>
What proportion of the beneficiaries will be disabled people? <b>100%</b>			

## 18. Funding required for the project

What is the total cost of the proposed activity/project?

(List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Trailblazers Manager - 1 day per week	£7,885	£8,121		£16,006
Campaigns Officer - 1 day per week	£5,078	£5,230		£10,308
Support from other Departments	£3,120	£3,214		£6,334
IT Support	£3,986	£4,106		£8,092
Communications (telephone, post etc)	£886	£912		£1,798
<b>TOTAL</b>	<b>£20,955</b>	<b>£21,583</b>		<b>£42,538</b>

What income has already been raised?

(List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
<b>TOTAL</b>				

What other funders are currently considering the proposal?

## 19. Funding requested from the Trust

How much is requested from the Trust? (List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Trailblazers Manager-1 day per week	£7,885	£8,121		£16,006
Campaigns Officer- 1 day per week	£5,078	£5,230		£10,308
Support from other Departments	£3,120	£3,214		£6,334
IT Support	£3,986	£4,106		£8.092
Communications (telephone, post etc)	£886	£912		£1,798
<b>TOTAL</b>	<b>£20,955</b>	<b>£21,583</b>		<b>£42,538</b>

## 20. Funding requested from the Trust (continued)

When will the funding be required? **March 2013**

Is the activity to continue beyond the period for which funding is requested?

If so, how will it be resourced? **We will assess whether the project is currently meeting its outcomes at the end of Year 1, which will inform how the project proceeds after the completion of the pilot. Should it be successful, we anticipate a wider roll out. If outcomes are not fully met, we will look at ways of adapting the project. Funding for either of these options would come from Trusts, Corporates and Individual Donors.**

If any planning or other statutory consents are required for the project to proceed, what stage have the applications reached? **N/A**

### Declaration on behalf of applicant organisation

I, **Peter Sutton** (your name)

am an authorised representative of

**Muscular Dystrophy Campaign** (your organisation)

within which I am **Trust Fundraiser** (your position)

**To the best of my knowledge, all the information that I have provided in this application form is correct**

Signature



Date **14/01/2013**

**Return the completed form to: The City Bridge Trust**

City of London  
PO Box 270  
Guildhall  
London EC2P 2EJ

Please

- **do not send this application by fax or e-mail** – unless applying online, applications must be posted to the Trust
- **do send the information in the checklist** – if items are missing, your application will be returned to you
- **do send only the information in the checklist** – if further information is required, we will contact you
- **do ensure you have signed and dated this form** – we cannot accept forms which have not been signed and dated
- **do use the correct postage** – the completed form and additional materials are likely to exceed 100g in weight

**ASSESSMENT CATEGORY - Positive Transitions to Independent Living**

**Stroke Association**

**Ref: 11487**

**Amount requested: £80,855**

**Adv: Stewart Goshawk**

**Base: Islington**

**Benefit: London-wide**

**Purpose of grant request:** Project to increase the skills, opportunities and employment prospects for disabled stroke survivors who are of working age and live in Greater London.

**Background**

Members will be familiar with the work of the Stroke Association, the national organisation working to improve the quality of life for people who have suffered a stroke. Sadly, about one-third of stroke sufferers do not survive and another third suffer serious and permanent disability or impairment. The remainder are able, through medical, social and therapeutic care, to regain many skills and to live a rich and fulfilling life (even if not at the full extent before their episode). The Stroke Association funds medical research into the causes and treatment of stroke; lobbies on behalf of stroke survivors for better care and treatment; and runs a range of direct services to improve the quality of life for individuals, their families and carers.

In 2008, the Government implemented a National Stroke Strategy, with £20m ring-fenced for the development of 'life after stroke' services. As a result, local information, advice and support services were established in 27 London boroughs commissioned through local authorities and the health service. Hospital services were also re-organised into 8 hyper-acute units across the capital. London is now one of the best-served cities in the world for stroke care.

**Funding History**

You have funded the Stroke Association twice before with grants of £62,000 in June 2001 for its information and advice service; and of £74,000 in June 2005 for work with young stroke survivors. Both grants were satisfactorily signed off.

**Current Application**

Stroke is generally perceived to be something that only affects older people. However, about 25% of those who suffer a stroke are of working age – which equates to around 3,000 Londoners - many of whom will want to continue in employment wherever possible. The Trust's previous grant to the organisation resulted in the establishment of a pilot "moving-

on project", a modular 10-12 week training course to enable younger stroke victims to regain their skills and confidence and to offer peer support amongst a group of individuals who can help one another. The project was also informed by the organisation's dealings with a large commercial employer which wanted to offer placements to stroke survivors but found that individuals were not sufficiently 'job ready' to take advantage of this offer. The feedback from the pilot course was most encouraging and the aim is now to roll the programme out across London.

Local schemes will be able to identify people they have helped who would benefit from this additional support and also help to build links with local employers that may have volunteer or paid opportunities to help introduce stroke survivors back to work. It is expected that over three years around 250 individuals (and thereby their families and carers) can be accommodated on the training. Understandably, not all participants will be successful in moving back into full-time paid employment, but all will have the opportunity to regain skills to help them engage better with mainstream society.

### **Financial Observations**

The Stroke Association is a large national charity funded by a wide range of statutory contracts, grants and general fundraising. The audited accounts for the year ended 31<sup>st</sup> March 2012 show that, despite some income streams holding good, the organisation made a deficit of some £2.0m (6.5% of turnover), which the charity attributes to the harsh economic climate and the difficulty in securing new contract and grant income. This downturn was reflected on the charity's balance sheet as it moved from a holding of Net Current Assets of £2.0m as at 31st March 2011, to Net Current Liabilities of £654k as at 31st March 2012. However, the latest balance sheet also records a holding of fixed asset investments with a market value of £16.3m.

The organisation operates a complex reserves policy to provide funds to meet identified needs and to act as a buffer against fluctuations in income. As at 31st March 2012, unrestricted free reserves amounted to £9.0m and represented 5.3 months' worth of budgeted operating expenditure against a stated target of 6 months' worth.

In response to the operating deficit of £2.0m in 2011/12, the charity has initiated cost saving and income generating ideas. These appear to be working with the latest forecast for the current year 2012/13 showing the operating deficit falling to £680k. Further improvement is anticipated in the following year 2013/14 with the budget showing a deficit of £77k.

### **Officer's Appraisal**

This proposal builds on work the Trust has previously funded at the Stroke Association and will go a long way to help rebuild many lives of

187

younger people devastated by a stroke. This request is to contribute towards the costs of the project delivery costs and the salary of the coordinator. Interestingly other funds are being raised by the former Australian Rugby Union captain, Michael Lynagh, who suffered a stroke in early 2012. In a high profile campaign, in partnership with colleagues from Sky TV, seven people including Michael himself will be running the 2013 London Marathon. Any grant should therefore be subject to confirmation that this endeavour (or others) has raised sufficient funds to make the project viable.

### **Recommendation**

**£80,850 over three years (£26,650; £27,300; £26,900) towards the costs of a back-to-work support programme for working age stroke survivors in London, subject to confirmation of the balance of funds required being secured from other sources.**





# The City Bridge Trust

Charity Registration Number: 1035628

## Working with Londoners: Application for a grant

Please read the guidance notes before completing this form

Reference:  
(office use only)

11487

Date Received:

20/11/2012

Programme  
Area:

06

### 1. About your organisation

Name of organisation applying for grant: <b>Stroke Association</b>	
If the organisation is part of a larger organisation, what is its name?	
Address for correspondence: <b>240 City Road London</b>	
Postcode: <b>EC1V 2PR</b> Is this your home address? <b>No</b>	
Contact person: <b>Mrs Natalie Prosser</b>	Position: <b>Senior Trusts Executive</b>
Phone: <b>02075661519</b>	Fax: <b>02074902686</b>
E-mail: <b>natalie.prosser@stroke.org.uk</b>	
Website: <b>http://www.stroke.org.uk</b>	
Legal status of organisation: <b>Registered Charity</b>	
If registered, please give charity number: <b>211015</b>	
Date organisation established: <b>01/01/2002</b>	

### 2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? <b>Positive Transitions to Independent Living</b>
Purpose for which funds are requested: (25 words maximum) <b>Project to increase the skills, opportunities and employment prospects for disabled stroke survivors who are of working age and live in Greater London.</b>
How much funding is requested? <b>Year 1: £26,644 Year 2: £27,324 Year 3: £26,887 Total: £80,855</b>

### 3. Aims of your organisation

The Stroke Association is the leading charity taking action on stroke across the UK.

We want a world where there are fewer strokes and all those touched by stroke get the help they need.

Our mission is to prevent strokes, and reduce their effect through providing Life After Stroke services, campaigning, education and research.

### 4. Main activities of your organisation

We campaign across the UK to promote greater understanding of stroke and to improve stroke services. We work with politicians to influence stroke policy and how it is implemented, and support stroke survivors at a local level to have a voice to campaign for improvements in their local services.

We support people affected by stroke, by providing reliable information and advice, delivering a broad range of Life After Stroke support services, assisting with financial needs and supporting stroke clubs.

We invest in vital stroke research, by awarding grants to stroke researchers for specific projects, and by funding fellowships to enable doctors, nurses and allied health professionals to train for a career in stroke research.

We work in partnership with people affected by stroke, volunteers, other organisations and supporters, to raise awareness of stroke and improve services for stroke survivors and their carers.

### 5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
<b>339</b>	<b>395</b>	<b>21</b>	<b>4,300</b>

### 6. How do you support your volunteers?

Following a robust recruitment and approval process we match volunteers with roles that suit their skills & interest areas.

Role-specific training, flexible opportunities, volunteer conferences, a recognition programme and informal feedback ensure our volunteers are engaged and nurtured, often into long term supporters.

### 7. Property occupied by your organisation

Is the main property owned or leased/rented by your organisation?	If leased/rented, how long is the outstanding lease/rental agreement?
<b>Rented</b>	<b>Until December 2017</b>

## 8. Finance

From your most recent audited or independently examined accounts, complete the following:

Financial year ended:-

**Month: 31st March**

**Year: 2012**

<b>Income received from:</b>	<b>£</b>
Voluntary income	16,664,000
Activities for generating funds	177,000
Investment income	394,000
Income from charitable activities	12,253,000
Other sources	1,099,000
<b>Total Incoming Resources</b>	<b>30,587,000</b>

<b>Expenditure:</b>	<b>£</b>
Charitable activities	25,056,000
Governance costs	97,000
Cost of generating funds	7,357,000
Other	0
<b>Total Resources Expended</b>	<b>32,510,000</b>
<b>Net (Deficit)/Surplus:</b>	<b>(1,923,000)</b>
<b>Other Recognised Gains/(Losses)</b>	<b>(283,000)</b>
<b>Net Movement in Funds</b>	<b>(2,206,000)</b>

<b>Asset position at year end</b>	<b>£</b>
Fixed assets	2,762,000
Investments	16,288,000
Net current assets/(liabilities)	(654,000)
Long-term liabilities	(4,901,000)
<b>*Total A</b>	<b>13,495,000</b>

<b>Reserves at year end</b>	<b>£</b>
Unrestricted funds	11,802,000
Restricted funds	1,693,000
Endowment funds	0
<b>*Total B</b>	<b>13,495,000</b>

## 9. Statutory funding

For the financial year above, what % of your income was from statutory sources?  
40%

## 10. Material changes

Describe any material changes to the organisation's activities, structure or financial position since the date of the most recent accounts:

none

## 11. Previous applications to the Trust

Have you applied to the Trust before? If so, please give details:

Month/Year:	02/05	Ref:	6317	Grant received:	£74,000	OR application rejected?	No
Month/Year:	02/01	Ref:	1098	Grant received:	£62,000	OR application rejected?	No
Month/Year:		Ref:		Grant received:		OR application rejected?	

## 12. Previous funding received

Funding received by your organisation from the following sources during the last **THREE** years:  
**(i)** City of London (other than the City Bridge Trust) **(ii)** London boroughs **(iii)** London Councils (formerly ALG)  
**(iv)** Health authorities **(v)** Central government departments **(vi)** Other statutory bodies (e.g. Housing Corporation, Arts Council) - List source, years and annual amounts:

	Year: 2009	Year: 2010	Year: 2011
(i) Leathersellers' Company Charitable Fund	1,000	0	0
The Grocers' Charity	3,000	0	0
(ii) 3 boroughs in 09/10	61,858.50		
5 boroughs in 10/11		189,368.80	
9 boroughs in 11/12			206,762.47
(iii) 4 in 09/10, 4 in 10/11 and 3 in 11/12	334,362.00	67,625.50	199,604.50
(iv) 295 PCTs (across the UK) over three years	402,229.50	259,004.30	408,377.97
(v)			
(vi) 7, including DOH Section 64 and BLF	289,526		
4, including DOH Section 64 and BLF		280,776	
4, including BLF			191,601

## 13. Previous grants received

Grants received by your organisation from charitable trusts and foundations (other than the City Bridge Trust) during the last **TWO** years. List source, years and annual amounts:

	Year: 2010	Year: 2011
Thompson Family Charitable Trust	200,000	100,000
Donald Forrester Trust	0	250,000
Garfield Weston Foundation	150,000	0
Wolfson Foundation	0	150,000
Constance Travis Charitable Trust	10,000	100,000
Other Trust Income	842,300	706,000

## 14. What steps is your organisation taking to reduce its carbon footprint?

As an organisation we 'reduce, reuse and recycle' as much as possible, and aim to keep travel between regional offices to a minimum. Some examples include the following:

1. We run video conferencing for meetings whenever possible to reduce travel.
2. If staff do need to travel, car sharing is encouraged.
3. Rechargeable batteries are used.
4. We recycle as much waste as possible. Recycling bins are used in all offices.
5. Stationary is reused as much as possible.
6. Mugs are used as opposed to plastic cups.
7. Double-sided printing and copying is used as appropriate.

## 15. Purpose

Complete this section whatever the amount of grant requested. **In addition**, if the request is for £25,000 or more in total, a fuller proposal should be sent with this form. Also, if your application is for all or part of new or existing post(s), please enclose a copy of the relevant job description(s) including the salary level.

**In order to provide the right information, please refer to guidance note 15 before completing this section.**

Stroke is a complex and long-lasting medical condition experienced by around 11,000 people in Greater London each year. Approximately 3,000 of these will be stroke survivors of working age (16-65) who are disabled because of their condition.

Stroke can be devastating, and the physical, social and emotional adaptations that stroke survivors and their families have to make in response to their condition, continue long after a person is clinically "better" and medical treatment has finished. Additionally, many younger stroke survivors find it physically and emotionally difficult to return to work after their stroke, which can affect family finances enormously.

Through working closely with stroke survivors in Greater London, we have identified a lack of support specifically for younger stroke survivors. In 2005 the City Bridge Trust generously funded the Stroke Association's 3-year Stroke Service for People of Working Age, which was a great success. However, at the time of the project's completion, the Government's new Stroke Strategy for England had recently been published and health reforms were taking place in London. The Stroke Association therefore decided to prioritise developing our own general strategy for our London region, before committing to any specific service provision. Our strategy was soon put in place, and our London team now provides 27 Borough-based Life After Stroke Services to stroke survivors of all ages. However, it is evident from learning the experiences of the stroke survivors who are using these services, that there is still a significant gap in support specifically for those who are of working age.

We want to employ an Employment Support Coordinator to deliver a project with four main objectives:

1. Provide a service aimed at younger stroke survivors in London, offering information, support and advice on a range of issues relating to living with their condition.
2. Develop and implement a 12-week modular support and training 'Back to Work' programme for younger disabled stroke survivors.
3. Develop a referral pathway by integrating the programme with local Stroke Association Life After Stroke Services and other relevant agencies.
4. Offer voluntary work placements within the Stroke Association and develop partnerships with London-based employers to provide both paid and voluntary work placements.

We anticipate that our project will directly benefit 80 people annually, with approximately 50 participating in the programme and the remainder receiving specific, tailored support and guidance. The project will also benefit many more people indirectly (families and carers, for example).

It is anticipated that around half of the programme beneficiaries will find themselves paid or voluntary work as a result of the support provided by this project.

We are the right organisation to deliver this project, as the Stroke Association has over 20 years' experience in supporting stroke survivors adapt to their lives after stroke. We are the only organisation that provides support to stroke survivors right across London, with services in 25 of the 33 Boroughs, and are therefore best placed to identify potential project beneficiaries.

User involvement is integral to all the Stroke Association's work. The experiences of the London Stroke Action Council (a group of people all affected by stroke), have helped to shape this project plan and will sit upon the reference group that will guide the project through its development phase.

Our project meets The City Bridge Trust's "Positive Transitions to Independent Living" priority. The project's aim is to create new opportunities for stroke survivors by increasing their skills, knowledge base and experience. We want to enable stroke survivors to adapt to their new disability, and to regain the confidence to return to work in order to become more emotionally and financially independent.

**16. Explain how you will monitor and evaluate both your own outcomes and those of the programme under which you are applying.**

Beneficiaries will be supported by the Employment Support Coordinator in establishing personal goals, within the seven outcome themes in 'Our health, our care, our say':

- 1.Exercise choice and control
- 2.Improved health and wellbeing
- 3.Personal dignity and respect
- 4.Improved quality of life
- 5.Freedom from discrimination and harassment
- 6.Economic well-being
- 7.Making a positive contribution

Within these outcome themes, we will monitor the following specific project outcomes:

Younger disabled stroke survivors reporting:

- 1.increased opportunities
- 2.increased independence
- 3.increased confidence
- 4.an improvement in adapting to their condition

Data will be recorded by the Coordinator using our database. With each participant, the Coordinator will monitor how participants' goals are being met, as the programme progresses and again when participants complete the programme.

Participants will also be invited to provide feedback at the end of their involvement.

The success of the project will be determined by participant numbers and the extent to which project outcomes are achieved.

**17. Beneficiaries**

How many people will benefit from the grant per year?  
**80 (direct beneficiaries)**

In which local authority is your organisation based?  
**Islington**

Which borough(s) of Greater London will benefit from this grant?  
(if more than one, please give % for each)

**Hopefully stroke survivors of all Boroughs will benefit from this grant.**

At what address will the activity be located?  
**Stroke Association Regional Office at London Bridge.**

What age group will benefit? **Adult, over 16 years**

What will the ethnic grouping(s) of the beneficiaries be?

	%		%
White - British		Black - Caribbean	
White - Irish		Black - African	
White - Other (please describe)		Black - Other (please describe)	
Asian - Indian		Black - British	
Asian - Pakistani		Chinese	
Asian - Bangladeshi			
Asian - Other (please describe)		Other (please describe)	
Open to everyone			<b>100</b>

What proportion of the beneficiaries will be disabled people?  
**100%**

## 18. Funding required for the project

What is the total cost of the proposed activity/project?

(List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Salary Costs	32,603	29,363	30,244	92,210
Employer's NI	3,180	3,180	3,180	9,540
Recruitment Costs	2,250	0	0	2,250
Computer Costs	2,300	0	0	2,300
Materials, printing, design	2,000	0	0	2,000
Programme Coordinator Travel	1,200	2,000	1,688	4,888
Room Rental	2,800	3,000	3,000	8,800
Participant Transport	5,500	6,000	6,000	17,500
Evaluation	0	515	600	1,115
Management Costs	7,500	7,000	7,500	22,000
HR Costs	900	0	0	900
IT Support	1,000	1,030	1,061	3,091
Employment Training to Stroke Association Staff	0	2,060	0	2,060
Volunteer Costs	500	500	500	1,500
<b>TOTAL</b>	<b>61,733</b>	<b>54,648</b>	<b>53,773</b>	<b>170,154</b>

What income has already been raised? (List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
Barnet Local Authority	8,445			8,445
<b>TOTAL</b>	<b>8,445</b>			<b>8,445</b>

What other funders are currently considering the proposal?

Funder	£
Leathersellers' Company Charitable Fund	45,000
Michael Lynagh/ Sky	80,854
<b>TOTAL</b>	<b>125,854</b>

## 19. Funding requested from the Trust


How much is requested from the Trust? (List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Contribution to overall project costs	26,644	27,324	26,887	80,855
<b>TOTAL</b>	<b>26,644</b>	<b>27,324</b>	<b>26,887</b>	<b>80,855</b>

## 20. Funding requested from the Trust (continued)

When will the funding be required? <p style="text-align: center;"><b>01/04/2013</b></p>
Is the activity to continue beyond the period for which funding is requested? If so, how will it be resourced? <b>We will seek funding, either through a contribution from the CCGs associated with each of our London Life After Stroke services benefiting from the programme's operation, or from the DWP who commission services aimed at providing support to help disabled people back into work.</b>
If any planning or other statutory consents are required for the project to proceed, what stage have the applications reached? <b>n/a</b>

### Declaration on behalf of applicant organisation

I, <u>Natalie Prosser</u> _____ (your name)
am an authorised representative of <u>Stroke Association</u> _____ (your organisation)
within which I am <u>Senior Trusts Executive</u> _____ (your position)
<b>To the best of my knowledge, all the information that I have provided in this application form is correct</b>
Signature <u></u> _____ Date <u>20/11/12</u> _____

### Return the completed form to: **The City Bridge Trust**

City of London  
PO Box 270  
Guildhall  
London EC2P 2EJ

#### Please

- **do not send this application by fax or e-mail** – unless applying online, applications must be posted to the Trust
- **do send the information in the checklist** – if items are missing, your application will be returned to you
- **do send only the information in the checklist** – if further information is required, we will contact you
- **do ensure you have signed and dated this form** – we cannot accept forms which have not been signed and dated
- **do use the correct postage** – the completed form and additional materials are likely to exceed 100g in weight



**MEETING: 18/04/2013**

**ANNEX NUMBER: 13**

**ASSESSMENT CATEGORY - Strengthening the Third Sector**

**CREATE London**

**Ref: 11547**

**Amount requested: £175,000**

**Adv: Clare Thomas**

**Base: City**

**Benefit: Several London boroughs**

**Purpose of grant request:** Sourcing, skilling up and mentoring 1,000 local volunteers to support the delivery of events in the Olympic Park and a series of art commissions.

**Background**

CREATE London, a newly registered, independent arts charity, was set up in 2008 as a project of East London Business Alliance (ELBA). CREATE is also a social enterprise, providing a programme of high-level, creative and cultural projects which contribute to long-term social and economic regeneration outcomes across East London. Through commissioning major projects, it attracts new audiences from the most deprived parts of the UK. The programme is underpinned by CREATE Jobs, which provides mentoring, support and paid employment opportunities for local young people.

**Funding History**

None.

**Current Application**

This application builds on highly successful arts activities for volunteers which formed a major part of the Cultural Olympiad in East London. The programme's principal objective is to secure a cultural legacy from the Games for the Host Olympic Boroughs. CREATE will build up a team of community volunteers and will provide them with medium to long-term opportunities. As well as improving the wellbeing of the individual volunteers and increasing their employability, the initiative will bring benefits to the wider community. The project will engage inspirational Gamesmakers and Team London Ambassadors from the Games, to help build the legacy and update the new volunteers' skills. The Gamesmakers and Team London Ambassadors will provide a comprehensive support package comprising: team-building; confidence-building and personal and social skills; problem-solving; and leadership opportunities. A good proportion of the volunteers will be involved in a unique, spectacular, weekend event on the first anniversary of the London 2012 Opening Ceremony. This arts and sports event will take place in the Queen Elizabeth Olympic Park. Working closely with the London Legacy Development Company and the Barbican Centre, the event aims to bring

back the spirit of the Games and their "feel good" factor. However, the programme of volunteering will run throughout a year-long programme across of a range of commissioned projects.

### **Financial Observations**

CREATE was established in 2008 with assistance from the East London Business Alliance (ELBA), a registered charity, and was initially governed by several host London Boroughs, particularly the London Borough of Hackney (LBH) which ran CREATE's finances, received grants and made payments. On 22nd February 2012 CREATE became a registered charity and a separate entity and has been operating as such since that time. An extract of LBH's accounts for the year ended 31st March 2012 has been provided which show income and expenditure relating to CREATE and this information is shown at Question 8 on the application form. A balanced position was achieved for the year with income of £801,000 equal to expenditure. At 31st March 2012 CREATE did not hold any reserve funds.

A forecast for the current year ending 31<sup>st</sup> March 2013 was provided on 21st March 2013 and this shows income of £1,802,705 and expenditure of £1,699,172, leading to an overall surplus of £103,533. This comprises surpluses of £22,555 on unrestricted activity and £80,978 on restricted funds. The £22,555 represents CREATE'S anticipated holding of unrestricted free reserves as at 31st March 2013. This compares to a draft reserves policy which requires that 6 months' worth of staff costs be held, amounting to £126,152. This policy will be presented to CREATE'S Board for approval in June this year.

The budget for the year commencing 1st April 2013 shows a surplus of £92,656, all relating to unrestricted activity. This is based on income of £850,978, which CREATE has advised is all secured. Unrestricted free reserves at 31<sup>st</sup> March 2014 are forecast to be approximately £115,000, which is marginally short of the target to hold £126,152.

### **Consultees**

The Barbican Centre, which accommodates CREATE (who are now Barbican Associates), is the partner jointly responsible for delivering the Anniversary event of the London 2012 Opening Ceremony. Their Director of Creative Learning commented as follows: *The Arts, Audiences and Learning divisions of the Barbican are working increasingly closely with CREATE in the planning, communicating and delivery of projects and events across its neighbouring East London boroughs. Both organisations are committed to ensuring a positive and sustained legacy from the Olympics in 2012 for the communities of East London and believe that a good part of this can be achieved through working in partnership. A recent example of this collaborative working is the launching of Open School East in summer 2013, which will be a Free Art School situated with artist studios on the De Beauvoir estate, set up primarily to work in*

*partnership with local organisations and engage the local community in a range of participatory activities.*

### **Officer's Appraisal**

Whilst CREATE is a newly established charity, in its first year of operating independently of ELBA, it has a 5-year track record of delivering arts commissions in East London. ELBA will continue to provide financial 'back office' services, including the preparation of management accounts. CREATE has secured the backing of several large businesses, statutory funding and various commissions; and has already raised over £850,978 towards the first year's running costs. You are asked to support the volunteering costs of its programme, with a 3-year grant amounting to £175,000. As CREATE has yet to test whether the 'Legacy' enthusiasm will continue after the first Anniversary of the London Games, it is advised to consider a grant of £75,000 for the first year's operation only. Further grants, if requested, would be conditional on a satisfactory monitoring and evaluation report at the end of the first year.

### **Recommendation**

**£75,000 towards the volunteering costs of supporting CREATE's involvement in arts activities in Queen Elizabeth Park and other commissions in East London.**



# The City Bridge Trust

Charity Registration Number: 1035628

## Working with Londoners: Application for a grant

Please read the guidance notes before completing this form

Reference:  
(office use only)

11547

Date Received:

07/12/2012

Programme  
Area:

07

### 1. About your organisation

Name of organisation applying for grant: <b>CREATE London</b>	
If the organisation is part of a larger organisation, what is its name? <b>East London Business Alliance (Accounts)</b>	
Address for correspondence: <b>c/o Barbican Centre Silk Street London</b>	
Postcode: <b>EC2Y 8DS</b> Is this your home address? <b>No</b>	
Contact person: <b>Ms. Hazel Durrant</b>	Position: <b>Head of Development</b>
Phone: <b>020 7382 7284</b>	Fax:
E-mail: <b>hazel@createlondon.org</b>	
Website: <b>http://www.createlondon.org</b>	
Legal status of organisation: <b>Registered Charity</b> If registered, please give charity number: <b>1146063</b> Date organisation established: <b>01/04/2012</b>	

### 2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? <b>Strengthening the Third Sector</b>
Purpose for which funds are requested: (25 words maximum) <b>Sourcing, skilling up and mentoring 1,000 local volunteers to support the delivery of events in the Olympic Park and a series of art commissions.</b>
How much funding is requested? <b>Year 1: £75,000 Year 2: £50,000 Year 3: £50,000 Total: £175,000</b>

### 3. Aims of your organisation

CREATE is a social enterprise committed to delivering groundbreaking, multi-disciplinary art projects that offer new perspectives on our daily lives.

We bring art out of traditional spaces and into east London's parks, playgrounds, rooftops and tucked-away places. We commission and produce work by emerging local artists and established international figures, and bring our younger residents behind the scenes with a programme of workshops, skills development, volunteering and job placements.

Our conviction is in the power of art to offer new perspectives on community life, provoking healthy debate and encouraging constructive change and social progress. In a part of London with the highest concentration of artists and creative businesses in Europe, but with some of the lowest levels of cultural engagement, we work to bridge traditional divides of class, education and social background with art that is ambitious, exciting and joyful.

### 4. Main activities of your organisation

All of our projects and commissions have at their core socially engaging art practice that looks at how creative communities can relate to their neighbourhood and contribute to urban renewal.

The 2013 Programme consists of 10 projects including:

- The social engagement of local communities with a large-scale event to mark the reopening of the North Olympic Park
- An architectural practice building a community hub and carpentry workshop
- A digital commission to reach and involve young people and mass audiences
- A Free Art School for MA Fine Art students placed within the heart of a community
- An artist-in-residence working with 200 residents
- Providing 500 internships, placements and sessional work opportunities for young people who usually face barriers to obtaining jobs in the arts
- A digital interactive project that explores connections between the growing digital community in east London and local communities
- A health and wellbeing art commission working with communities that have some of the lowest health and wellbeing indicators in London

### 5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
<b>4</b>	<b>2</b>	<b>8</b>	<b>2,600</b>

### 6. How do you support your volunteers?

The volunteers will be given expenses: volunteer expenses covering food and travel; they will have a volunteer co-ordinator and enjoy the same rights as paid staff.

We also look to provide exit strategies and/or further skills training or job opportunities.

### 7. Property occupied by your organisation

Is the main property owned or leased/rented by your organisation?	If leased/rented, how long is the outstanding lease/rental agreement?
<b>Rented</b>	

## 8. Finance

Audited accounts are not available for CREATE as the current year to 31<sup>st</sup> March 2013 is the organisation's first year of operation as a charity. The London Borough of Hackney previously managed the finances of CREATE and an extract of their accounts which relate to CREATE is presented below for the year ended 31<sup>st</sup> March 2012.

Financial year ended -

Month: **March**

Year: **2012**

Income received from:	£
Voluntary income	801,000
Activities for generating funds	
Investment income	
Income from charitable activities	
Other sources	
<b>Total Incoming Resources</b>	<b>801,000</b>

Expenditure:	£
Charitable activities	801,000
Governance costs	
Cost of generating funds	
Other	
<b>Total Resources Expended</b>	<b>801,000</b>
<b>Net (Deficit)/Surplus:</b>	<b>0</b>
<b>Other Recognised Gains/(Losses)</b>	
<b>Net Movement in Funds</b>	<b>801,000</b>

Asset position at year end	£
Fixed assets	
Investments	
Net current assets/(liabilities)	
Long-term liabilities	
<b>*Total A</b>	<b>0</b>

Reserves at year end	£
Unrestricted funds	
Restricted funds	
Endowment funds	
<b>*Total B</b>	<b>0</b>

## 9. Statutory funding

For the financial year above, what % of your income was from statutory sources?

## 10. Material changes

Describe any material changes to the organisation's activities, structure or financial position since the date of the most recent accounts:

**CREATE originated in 2008. It gained independence from the Host Boroughs in 2011. A limited company was formed, and in early 2012 CREATE became a charity and started 'trading' in April 2012. ELBA, a charity, has capacity built CREATE since 2007, was the TUPE recipient for CREATE and manages its accounts. Since 2010 ELBA has received charitable funds and been the guarantor on its behalf.**

## 11. Previous applications to the Trust

Have you applied to the Trust before? If so, please give details:

Month/Year:	Ref:	Grant received:	OR application rejected?
Month/Year:	Ref:	Grant received:	OR application rejected?
Month/Year:	Ref:	Grant received:	OR application rejected?

## 12. Previous funding received

Funding received by your organisation from the following sources during the last **THREE** years:  
**(i)** City of London (other than the City Bridge Trust) **(ii)** London boroughs **(iii)** London Councils (formerly ALG)  
**(iv)** Health authorities **(v)** Central government departments **(vi)** Other statutory bodies (e.g. Housing Corporation, Arts Council) - List source, years and annual amounts:

	Year: 2010	Year: 2011	Year: 2012
(i)	0	0	0
(ii)	0	150,000	150,000
(iii)	0	0	0
(iv)	0	0	0
(v)			
(vi)	0	412,062	396,145

## 13. Previous grants received

Grants received by your organisation from charitable trusts and foundations (other than the City Bridge Trust) during the last **TWO** years. List source, years and annual amounts:

	Year: 2011	Year: 2012
CREATE registered as a charity in March 2012	0	0

## 14. What steps is your organisation taking to reduce its carbon footprint?

- Focus on local art commissions and thus a reduction in car use and air travel
- Use of recycled paper
- Buying environmentally friendly cleaning products and more sustainable food products e.g. Fair-trade beverages
- Turning lights off in well lit rooms and when leaving the office
- Seeking to buy energy efficient electrical items
- Turning on electrical items only when necessary
- Turning off monitors when leaving desks for long periods
- Boiling only enough water for requirements
- Keeping waste items to a minimum, particularly paper which should be reduced, reused and recycled
- Single-sided print-outs should be re-used for note paper
- Recycling boxes placed in the office
- All packaging, tin cans, plastic and to be recycled in bins provided
- Toner cartridges are recycled/refilled
- Staff are encouraged to use low-impact methods of travelling, such as public transport, cycling and walking. Car sharing is encouraged.

## 15. Purpose

Complete this section whatever the amount of grant requested. **In addition**, if the request is for £25,000 or more in total, a fuller proposal should be sent with this form. Also, if your application is for all or part of new or existing post(s), please enclose a copy of the relevant job description(s) including the salary level.

**In order to provide the right information, please refer to guidance note 15 before completing this section.**

After building a reputation for developing laudable models to achieve meaningful social engagement through the arts, we are now taking this work forward to allow for greater impact for our future programmes. We will now run projects, which deliver community engagement and participation outcomes from the development process through to project completion. All of our projects in 2013 will be supported by a significant level of research and evaluation working in partnership with reputable academic institutions. Our core mission is to produce work aimed at engaging local communities in transformational, long-term and meaningful ways. For such commissions, which will take place in the Olympic Park and around the Host Boroughs, we want to build up a team of community volunteers to deliver and add value to what we deliver.

There will be a series of volunteering opportunities which will support our commissions and allow them to be fully realised and/or serve as a way of supporting communities and beneficiaries to engage meaningfully and in depth with artistic and creative activities that changes their communities for the better.

The projects will engage Gamesmakers and Team London Ambassadors from the Games and will look to build on the skills and legacy Games experience of local volunteers in the following ways:

- Provide medium to long-term volunteering opportunities to build communities and to ensure legacy outcomes regarding employability skills
- Pass on practical skills building and painting physical structures e.g. as with previous projects such as Barking Bathhouse and Folly for a Flyover
- Work with those who manage local community spaces and events so they develop skills to make their areas a better place to live
- Allowing local people to meet, work and engage with their neighbours or communities outside of their own niches or networks

How it will work

There would be workshops where we will work with those who have provided the framework and infrastructure for Games-time volunteering and use them to inspire and recruit volunteers. Veteran Gamesmakers and Team London volunteers, from the Host Boroughs, would act as role models and give a view as to why they volunteered; what it brought to them personally, and skills-wise, and how the experience instilled good citizenship values.

ELBA has been a long-time supporter of CREATE and, working with them and their corporate members, we will provide a comprehensive support package for community volunteer beneficiaries e.g.:

- Icebreakers for team building
- Confidence building skills for personal development
- Finding your voice: delegation
- Working as a team: cooperation and negotiation
- Asking for help: problem solving and understanding the strength of the team
- Leadership with responsibility: efficiency under pressure

There will be flexibility in terms of delivery i.e. sessions at the schools, colleges, community venues/hubs, tenant associations and at or near the Olympic Park or landmark venues in the Host Boroughs.

Local Gamesmakers and GLA Team London Ambassadors will provide a support package covering:

- Team spirit
- Customer/Visitor experience
- Unpaid but valued
- An experience money cannot buy
- A gateway to jobs

Framework for success

- There would be a clear timeline to get volunteers ready for action
- We would work with statutory and other providers to secure public-facing experiences prior to staff volunteering during in the summer. Thus ensuring people understood the pressure, demands and challenges of the job
- We will provide expenses
- Uniform
- Volunteer celebration event

We will have a volunteer coordinator to aid delivery and will work with our Partners ELBA throughout the year to ensure continuity of service and a high quality experience.



**16. Explain how you will monitor and evaluate both your own outcomes and those of the programme under which you are applying.**

We will develop a specific project plan with timelines, milestones, outputs and outcomes and such targets/KPIs will be reviewed quarterly so that provision improves over the lifetime of the project.

All of our work will be evaluated annually using a combination of focus groups and questionnaires. We also carry out regular reporting to bodies such as the Arts Council and Legacy Trust UK, as well as the CREATE board.

There will be live feeds via the website and in 'real time' using our Facebook and Twitter pages.

We will build in a research element to measure impact across all the commissions and will do this in conjunction with London Universities that are part of the London Creative and Digital Fusion programme. Lessons learnt from the project evaluations will feed into the future development of our commissions and how we involve local communities in delivering and benefitting from our work.

**17. Beneficiaries**

How many people will benefit from the grant per year?

**70,000**

In which local authority is your organisation based?

**City**

Which borough(s) of Greater London will benefit from this grant?

(if more than one, please give % for each)

**Hackney; Newham; Tower Hamlets; Waltham Forest; Barking and Dagenham; Greenwich**

At what address will the activity be located?

**In various locations within these boroughs: Hackney, Newham, Tower Hamlets, Waltham Forest, Barking and Dagenham, Greenwich and a landmark event in the Olympic Park.**

What age group will benefit? **All**

What will the ethnic grouping(s) of the beneficiaries be?

	<b>%</b>		<b>%</b>
White - British	<b>40</b>	Black - Caribbean	<b>2</b>
White - Irish	<b>1</b>	Black - African	<b>12</b>
White - Other (please describe) Eastern European, Turkish, Kurdish	<b>5</b>	Black - Other (please describe)	
Asian - Indian	<b>2</b>	Black - British	<b>12</b>
Asian - Pakistani	<b>4</b>	Chinese	<b>1</b>
Asian - Bangladeshi	<b>12</b>		
Asian - Other (please describe) Vietnamese	<b>2</b>	Other (please describe) Mixed Race	<b>7</b>
			Open to everyone

What proportion of the beneficiaries will be disabled people?

**10%**

## 18. Funding required for the project

What is the total cost of the proposed activity/project?

(List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
CREATE Programme 2012	790,000	665,000	800,000	<b>2,255,000</b>
Volunteering	75,000	50,000	50,000	<b>175,000</b>
Core operation	250,000	260,000	270,000	<b>780,000</b>
Research and Development	30,000	25,000	20,000	<b>75,000</b>
<b>TOTAL</b>	<b>1,145,000</b>	<b>1,000,000</b>	<b>1,140,000</b>	<b>3,285,000</b>

What income has already been raised? (List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
Private, Companies (CSR)	490,000	90,000	90,000	<b>670,000</b>
Trusts and Foundations	0	0	0	<b>0</b>
Statutory Sources	470,000	300,000	0	<b>770,000</b>
Commissioning partners	100,000	0	0	<b>100,000</b>
<b>TOTAL</b>	<b>1,060,000</b>	<b>390,000</b>	<b>90,000</b>	<b>1,540,000</b>

What other funders are currently considering the proposal?

Funder	£
Bloomberg, Deutsche Bank, Canary Wharf Group	375,000
Arts Council England	100,000
LLDC	50,000
<b>TOTAL</b>	<b>525,000</b>

## 19. Funding requested from the Trust

How much is requested from the Trust? (List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Volunteering	75,000	50,000	50,000	<b>175,000</b>
<b>TOTAL</b>	<b>75,000</b>	<b>50,000</b>	<b>50,000</b>	<b>175,000</b>

## 20. Funding requested from the Trust (continued)

When will the funding be required?

17/03/2013

Is the activity to continue beyond the period for which funding is requested?

If so, how will it be resourced?

**We will work with local authorities, the GLA, CVS DWP to develop longer-term programmes having proved the value of our three-year programme. We would expect the economic climate to have improved and the timing would coincide with the full reopening of the Olympic Park, for which a huge human resource would be needed.**

If any planning or other statutory consents are required for the project to proceed, what stage have the applications reached?

**We have been invited to work on the animation and curation of the Olympic Park by London Legacy Development Company and we will work on the delivery the arts provision for the park with our partner, The Barbican. All planning consents are with the LLDC, which is chaired by the Mayor of London.**

### Declaration on behalf of applicant organisation

I, HAZEL DURRANT (your name)

am an authorised representative of

CREATE LONDON (your organisation)

within which I am HEAD OF DEVELOPMENT (your position)

To the best of my knowledge, all the information that I have provided in this application form is correct

Signature H Durrant Date 11/12/12

Return the completed form to: **The City Bridge Trust**

City of London  
PO Box 270  
Guildhall  
London EC2P 2EJ

Please

- **do not send this application by fax or e-mail** - unless applying online, applications must be posted to the Trust
- **do send the information in the checklist** - if items are missing, your application will be returned to you
- **do send only the information in the checklist** - if further information is required, we will contact you
- **do ensure you have signed and dated this form** - we cannot accept forms which have not been signed and dated
- **do use the correct postage** - the completed form and additional materials are likely to exceed 100g in weight

**MEETING: 18/04/2013**

**ANNEX NUMBER: 14**

**ASSESSMENT CATEGORY - Strengthening the Third Sector**

**Pilotlight**

**Amount requested: £50,925**

**Ref: 11316**  
**Adv: Ciaran Rafferty**  
**Base: Camden**  
**Benefit: Hillingdon,**  
**Lambeth, Lewisham,**  
**Southwark**

**Purpose of grant request:** 'Pilotlight Local' - for London roll-out and replication. Programme builds locally supportive bridges between voluntary sector, businesses and local authorities.

**Background**

Pilotlight, was set up in 1996 by Jane Tewson, the founder of Comic Relief. It endeavours to strengthen the Voluntary and Community Sector by introducing to it leaders from the business world who volunteer their business skills to help sustain charitable work. The basic premise is that charities, especially the smaller ones, are often so pre-occupied with frontline service delivery that building organisational capability and sustainability is neglected. Many need help with business planning, marketing, evaluation, governance, personnel and other legal and fiscal requirements and so Pilotlight will enable and support relationships between corporate-sector professionals with such skills and the groups which might need them.

**Funding History**

The charity has received two grants previously. The first, for £22,860, was awarded in January 2004 and was to support its work in recruiting and supporting volunteers. The second grant, in March 2008, was for £52,500 for three years' support of work helping charities to evaluate their impact. Both grants were satisfactorily monitored.

**Current Application**

This application is to support the roll-out of a new venture called *Pilotlight Local*. Whereas the "standard" – and successful – scheme matches teams of senior business people (Pilotlighters) as coaches for individual charities Pilotlight Local also incorporates businesses within the charity's local community and the local authority, in a cohesive triangular arrangement.

The core model is the same in that a team of 4 Pilotlighters will be assigned to a charity or social enterprise (eligibility is restricted to those organisations with turnover of less than £3m). Together, over the course of a year, they will work to produce a bespoke business plan for the charity, developing and embedding business/management skills in the

process. In addition, under Pilotlight Local, there will also be a series of workshops devised to bring groups together for mutual training in resource sharing, for example, or in revenue generation techniques (focusing on private and public sector bidding). The third workshop programme will link the organisations to their local businesses at a point where the groups will have gained sufficient competency to work to a strategic plan with potential, local, supporters. It is this development of local networks which distinguishes the Local scheme from the standard format and which, it is hoped, will go further make the organisations more sustainable. Pilotlight Local has been successfully trialled in other areas of London leading to this application to support its roll-out into four other boroughs.

### **Financial Observations**

The organisation has presented audited accounts for the year ending 31<sup>st</sup> December 2011 and these show a deficit of £20,003 (1.6% of turnover). The accounts record that the charity does not hold any unrestricted free reserves and that they are in a negative position amounting to £41,926. This compares to a reserves policy target to hold 3 months' worth of staff costs which the charity calculates as being £213,000.

Draft accounts for the year ended 31<sup>st</sup> December 2012 show an overall surplus of £163,453, with £33,923 relating to unrestricted activity and the balance of £129,530 being the net receipt of restricted funds. These results improve the unrestricted free reserves position but it still remains a negative £7,442.

The budget for the current year to 31 December 2013 predicts an overall surplus of £36,901, comprising a surplus on unrestricted activity of £101,601 and a net deficit on restricted funds of £64,700. If this budget proves to be realistic then unrestricted free reserves should turn positive with a holding of approximately £94,000, which equates to just under half of the charity's reserves policy target.

Overall, projections show an improving position but it is recommended that any grant be subject to sight of audited and satisfactory accounts for 2012, which are likely to be available at the end of May this year. It is also suggested that an updated forecast for the current year 2013 is provided at the same time.

### **Officer's Appraisal**

The general Pilotlight model has operated successfully for a number of years. Pilotlight Local will bring a new dimension in that it will provide the same, high-quality, professional support but in the context of an organisation's own community. Linking the group much more strongly to its local authority and to local businesses will help their work be seen and valued and, hopefully, will lead to it being more sustainable over the longer term. A grant, if awarded, will help Pilotlight continually evaluate

and fine-tune the project throughout its implementation in four London Boroughs.

### **Recommendation**

**£51,000 over two years (2 x £25,500) towards the costs of implementing and evaluating Pilotlight Local in four London boroughs. The grant is subject to receipt of audited and satisfactory 2012 accounts and an updated forecast for the current year 2013.**



# The City Bridge Trust

Charity Registration Number: 1035628

## Working with Londoners: Application for a grant

Please read the guidance notes before completing this form

Reference:  
(office use only)

11316

Date Received:

26.07.12

Programme  
Area:

7

### 1. About your organisation

Name of organisation applying for grant: <b>Pilotlight</b>	
If the organisation is part of a larger organisation, what is its name?	
Address for correspondence <b>15 - 17 Lincoln's Inn Fields, London (group home address of the organisation; see below)</b>	
Postcode: <b>WC2A 3ED</b> Is this your home address? <b>Yes</b>	
Contact person: <b>Ms Mary Loxley</b>	Position: <b>Development Officer</b>
Phone: <b>0207 396 7414</b>	Fax: <b>0207 396 7414</b>
E-mail: <b>mloxley@pilotlight.org.uk</b>	
Website: <b>www.pilotlight.org.uk</b>	
Legal status of organisation: <b>Registered Charity and Company Limited by Guarantee</b>	
If registered, please give charity number: <b>Registered Charity 1059660</b>	
Year and month organisation established: <b>Charity registered Dec 1996</b>	

### 2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? <b>Strengthening the Third Sector</b>
Purpose for which funds are requested: (25 words maximum) <b>'Pilotlight Local' - for London roll-out and replication. Programme builds locally supportive bridges between voluntary sector, businesses, and local authorities for charities' sustainability.</b>
How much funding is requested? <b>Year 1: £25,462 Year 2: £25,462 Year 3: £0</b> <b>Total: £50,925</b>

### 3. Aims of your organisation

Pilotlight's central mission is to enable small, ambitious charities to become more effective, so that they can directly help more service-users in areas of significant need and to alleviate disadvantage. We aim to bring about measurable, long-term change through volunteer business mentoring and learning & evaluation. Through this facilitation method, we bridge skills gaps in charities and bring together the passion and expertise of the voluntary/charitable sector with the best of business thinking to help create more effective and sustainable small charitable organisations; and bring about measurable, long-term, change through mentoring and learning and evaluation. Pilotlight works only with small charities and social enterprises, because we believe that they are best placed to find innovative and effective solutions to the changing needs of the disadvantaged in their communities. And, especially in the current financial climate, a primary objective of any small community or voluntary organisation should be to make themselves sustainable.

### 4. Main activities of your organisation

The Pilotlight process works by our managing carefully selected teams of senior business people ('Pilotlighters') as coaches for individual charities with specific needs. Following an initial organisational analysis of need, each Pilotlight process starts by facilitating a team of business mentor volunteers to work with a chosen charity's organisational structure – largely by coaching the senior operational personnel on previously identified topics. In this way, and with a Pilotlight Project Manager guiding the process, we work with the charities on defined projects to increase and strengthen levels of relevant key strategic-thinking skills – analysis and planning; fundraising and financial management; staff and trustee performance; communications; measurement. The model works at grass-roots level: via regular meetings with a team of four Pilotlighters, and with the personnel representing some charities being very much user-led. The project-period that we use for each Pilotlight project is approximately 12 months, and accommodates an average of 11 meetings. Each individual process is then followed by a project evaluation carried out by our Evaluation Manager, and which is on-going and informs all of our future work. Pilotlight works in England, Scotland, and Wales, and currently with 75 charities in need.

### 5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
18	5	13	326

### 6. How do you support your volunteers?

The volunteer number given above corresponds to the number of volunteer Pilotlighters we work with. Support is given in each Pilotlight engagement, volunteers attend events, and are interviewed and inducted with us at initial approach stage.

### 7. Property occupied by your organisation

Is the main property owned or leased/rented by your organisation?	If leased/rented, how long is the outstanding lease/rental agreement?
Rented	Lease has 4 years to run.



## 8. Finance

From your most recent audited or independently examined accounts, complete the following:

Financial year ended -

Month: December

Year: 2011

Income received from:	£
Voluntary income	702,698
Activities for generating funds	0
Investment income	0
Income from charitable activities	576,682
Other sources	0
<b>Total Income</b>	<b>1,279,380</b>

Expenditure:	£
Charitable activities	1,188,211
Governance costs	5,650
Cost of generating funds	105,522
Other	0
<b>Total Expenditure</b>	<b>1,299,383</b>
<b>(Deficit)/surplus for the year:</b>	<b>(20,003)</b>

Asset position at year end	£
Fixed assets	4,431
Investments	0
Net current assets	(39,843)
Long-term liabilities	0
<b>*Total A</b>	<b>(35,502)</b>

Reserves at year end	£
Endowment funds	0
Restricted funds	2,083
Unrestricted funds	(37,585)
<b>*Total B</b>	<b>(35,502)</b>

\* Total A and Total B must be the same and should be taken from your balance sheet

## 9. Statutory funding

For the financial year above, what % of your income was from statutory sources?  
0%

## 10. Material changes

Describe any material changes to the organisation's activities, structure or financial position since the date of the most recent accounts:

Re. reserves and deferred income: Our Trustees recently decided to adopt an accounting method which spreads our corporate subscription/membership income, like grant income, throughout the year. Given the strictness of this new discipline, we are working successfully towards positive reserves. But, in the meantime, we are cash-rich. However, this whole issue is quite detailed, and I am very happy to answer any of your questions.

## 11. Previous applications to the Trust

Have you applied to the Trust before? If so, please give details:						<input checked="" type="checkbox"/>
Month/Year: Mar	/	2008	Ref: 8555	Grant received: £52,500	OR application rejected	<input type="checkbox"/>
Month/Year: -	/	-	Ref:	Grant received: £	OR application rejected	<input type="checkbox"/>
Month/Year: -	/	-	Ref:	Grant received: £	OR application rejected	<input type="checkbox"/>

## 12. Previous funding received

Funding received by your organisation from the following sources during the last **THREE** years:  
**(i)** City of London (other than the City Bridge Trust) **(ii)** London boroughs **(iii)** London Councils (formerly ALG)  
**(iv)** Health authorities **(v)** Central government departments **(vi)** Other statutory bodies (e.g. Housing Corporation, Arts Council) - List source, years and annual amounts:

	Year: 2009	Year: 2010	Year: 2011
(i)			
(ii)			
(iii)			
(iv)			
(v) Scottish Executive		15,000	
(vi)			

## 13. Previous grants received

Grants received by your organisation from charitable trusts and foundations (other than the City Bridge Trust) during the last **TWO** years. List source, years and annual amounts:

	Year: 2010	Year: 2011
Waterloo Foundation	15,000	15,000
Mercers' Charitable Trust	5,000	
St James's Place Foundation	11,424	
MacRobert Trust	10,000	
Gannochy Trust	14,521	
Wates Foundation & John Ellerman		10k & 25k

## 14. What steps is your organisation taking to reduce its carbon footprint?

Our two offices in London, and also our office in Edinburgh, are based in office complexes with strong energy-saving principles.

Each office operates re-cycling functions for paper and consumables (plastic, glass, printer toner cartridges etc). In addition, staff are advised to print emails only when necessary, to use double-sided printing wherever possible, and to switch off computers and equipment at the end of each day.

Finally, and relevant to those staff that travel for Pilotlight engagements, and between our Edinburgh and London offices, it is our policy to use trains for business rather than air travel.

## 15. Purpose

Complete this section whatever the amount of grant requested. **In addition**, if the request is for £25,000 or more in total, a fuller proposal should be sent with this form. Also, if your application is for all or part of new or existing post(s), please enclose a copy of the relevant job description(s) including the salary level.

**In order to provide the right information, please refer to guidance note 15 before completing this section.**

Pilotlight has witnessed how the on-going economic situation has fundamentally impacted traditional support structures of the voluntary/charitable sector and, with our remit, has chosen to respond to this circumstance with a new variation on our existing model. 'Pilotlight Local' particularly equips small ambitious charities (three in each participatory borough) for survival in - and with - their localities, to enable them to help an increased number of service-users more effectively, and to adapt to the present funding and support environment. This variation is achieved with input in the Pilotlight process from local national business (ie. major firms which are based in a locality, but whose operations are not local, or exist beyond the local), and with Local Authority engagement - and so creating long-lasting connections with them. We have an initial Pilotlight Local programme currently in operation in Hillingdon, and actions also underway to replicate the pilot in Southwark, Lambeth, and Lewisham. The subject of this application is Pilotlight Local as it will operate in these four boroughs - but also to use the learning acquired during this process to replicate our model across the capital (and beyond).

Pilotlight Local works as a cohesive triangular arrangement. In this way, it builds bridges and connections with the local community, and has benefits for all the different entities/groupings involved. As per our standard operation and targets described in Section 4 above, we have a year's engagement with each charity as it works with a team of four Pilotlighters and which, ostensibly, leads to the achievement of writing a business plan and, through this, the skills and tools to run a business-like operation. As Pilotlight Local 'additional', we also hold a series of workshops devised to bring the different participants in the process together. The first workshop is held after three months and brings together all three charities for knowledge and resource sharing potential; the second is held after six months and is a revenue generation workshop focusing on private and public sector bidding and with commissioners present; and, after nine months, the third looks at introducing charities to more local businesses and at the point at which the charities will have gained sufficient competency to work to a strategic plan with potential supporters. In addition, the charity-sharing workshop is repeated during the process to consolidate sector learning and sharing.

In preparation for our development work with the four try-out boroughs, we had initial meetings with the local CVS, local authorities, and local national businesses; and our Evaluation Manager also carried out baseline measurement on existing levels of connections within the community. We believe that we are best placed to deliver the specific Local model on the basis of our existing successes in targeting effectiveness and capacity issues with small charities and social enterprises - and, especially, with the research, development, and activity we are undertaking in Hillingdon. We also have a strong track-record in accessing and retaining top-quality business talent for servicing the standard Pilotlight process. And, specifically for Pilotlight Local, we have built up connections relevant to all participants in the initiative (local businesses, Local Authorities, CVS etc). In summary, and to give three measurable outputs existing with outcomes, Pilotlight Local achieves:

- For charities and social enterprises - the gaining of specific skills, increased capacities, and local connections to meet the needs of local communities and service users; enabling voluntary sector growth and survival in the current climate, back-room sharing and even joint bidding.
- For Local Authorities - the facilitation of relationships with the local voluntary sector (and which is then better skilled, and more competent, as a deliverer through the commissioning/bidding process); confidence in Pilotlight's successful process as charities engage with Local Authorities.
- For local/local national businesses - improving corporate and employee engagement by the exercising of skills/knowledge sharing with their local community; on-going corporate involvement.

Funding request is Learning & Evaluation staff costs (£38,925), and for workshops (£12,000).

Applicable to size of grant request, see also attached organisational evaluation/support documents.\*

\* on file

**16. Explain how you will monitor and evaluate both your own outcomes and those of the programme under which you are applying.**

As indicated throughout this application, a comprehensive evaluation process is intrinsic to Pilotlight's remit. We employ a dedicated Evaluation Manager who works on all our programmes with pre and post process assessment and measurement - and we also produce an annual formal evaluation report documenting the impact of our work, and the learning to be gained from it. In overall respect of Pilotlight Local, whilst some elements of success may be determinable within the relatively short-term (18 months), the true success of the joint-working initiative lies in the long-term results achieved by the the charities and for the benefit of their communities. Pilotlight will be tasked with ensuring that the charities have the skills, expertise, and local business/funding support to continue their work once the Pilotlight partners have withdrawn. The longterm aim is, thus, to bring about sustainable improvements that will continue to make a measurable impact locally. To this end, Pilotlight will seek to carry out an annual evaluation of each charity/social enterprise for at least five years after the completion of the project - and to inform replication and roll-out of the model across London boroughs and further afield.

**17. Beneficiaries**

How many people will benefit from the grant per year? **c. 2,500 helped in Hillingdon. Up to this maximum per borough expected elsewhere.**

In which local authority is your organisation based?  
**Camden and City of London (we have two Pilotlight offices in London)**

Which borough(s) of Greater London will benefit from this grant?  
(if more than one, please give % for each)  
**Hillingdon, Lambeth, Lewisham, Southwark. Pilotlight Local aims to work equally with each borough.**

At what address will the activity be located? **The programmes works within each locality; but administered centrally.**

What age group will benefit? **All**

What will the ethnic grouping(s) of the beneficiaries be?

	%		%
White - British		Black - Caribbean	
White - Irish		Black - African	
White - Other (please describe)		Black - Other (please describe)	
Asian - Indian		Black - British	
Asian - Pakistani		Chinese	
Asian - Bangladeshi			
Asian - Other (please describe)		Other (please describe)	

Open to everyone **YES**

What proportion of the beneficiaries will be disabled people?  
**Pilotlight responds to a range of charities and works widely with communities addressing social welfare, access, and exclusion concerns.**

## 18. Funding required for the project

What is the total cost of the proposed activity/project?

(List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Core Staff Costs for delivery of Local	23,250	23,250		46,500
Workshops	6,000	6,000		12,000
Pilotlighting charity costs	84,000	84,000		168,000
Publicity	3,000	3,000		6,000
Local Authority bursary place	12,000	12,000		24,000
Learning & Evaluation process, & includes writing Process Manual	13,650	13,650		27,300
<b>TOTAL</b>	<b>141,900</b>	<b>141,900</b>		<b>283,800</b>

What income has already been raised?

(List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
£120,000 achieved in partnership funding through Membership contributions to our working with charities in process	60,000	60,000		120,000
<b>TOTAL</b>				

What other funders are currently considering the proposal?

**Freemasons' Grand Charity have been approached to fund the Pilotlight Local element of our Head of Programme Development position. We will have a decision from them by Autumn 2012.**

## 19. Funding requested from the Trust

How much is requested from the Trust? (List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Learning & Evaluation (as shown above)	13,650	13,650		27,300
Learning & Evaluation (core staff costs)	5,812	5,812		11,625
Workshops	6,000	6,000		12,000
<b>TOTAL</b>	<b>25,462</b>	<b>25,463</b>		<b>50,925</b>

## 20. Funding requested from the Trust (continued)

When will the funding be required? **We would be able to use the funds as soon as they might become available.**

Is the activity to continue beyond the period for which funding is requested?

If so, how will it be resourced? **The four initial boroughs for Pilotlight Local will lead to our extending the process elsewhere. In terms of finance, our Pilotlighters make a donation towards the cost of managing their time and, thus, the running of our programmes; and we operate with approx 75% of our costs covered by these business-membership contributions and that of our Associates. The remaining income is derived from grants.**

If any planning or other statutory consents are required for the project to proceed, what stage have the applications reached? **N/A**

### Declaration on behalf of applicant organisation

I, **Mary Loxley** (your name)

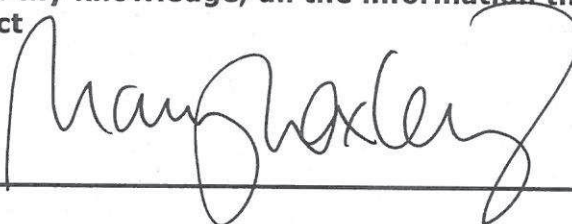
am an authorised representative of

**Pilotlight** (your organisation)

within which I am **Development Officer** (your position)

**To the best of my knowledge, all the information that I have provided in this application form is correct**

Signature



Date **24 July 2012**

**Return the completed form to: The City Bridge Trust**

City of London

PO Box 270

Guildhall

London EC2P 2EJ

Please

- **do not send this application by fax or e-mail** – unless applying online, applications must be posted to the Trust
- **do send the information in the checklist** – if items are missing, your application will be returned to you
- **do send only the information in the checklist** – if further information is required, we will contact you
- **do ensure you have signed and dated this form** – we cannot accept forms which have not been signed and dated
- **do use the correct postage** – the completed form and additional materials are likely to exceed 100g in weight

**MEETING: 18/04/2013**

**ANNEX NUMBER: 15**

**ASSESSMENT CATEGORY - Strengthening the Third Sector**

**Heart of the City**

**Ref: 11640**

**Adv: Jenny Field**

**Amount requested: £108,640**

**Base: City**

**Benefit: Several London boroughs**

**Purpose of grant request:** To extend the funding of our City fringes Newcomers Programme in order to give us the flexibility to build a sustainable, self-funding model. Y2 includes provision for final research report on impact.

**Background**

Members will be familiar with Heart of the City (HotC). Established in the early 2000s, it was the brainchild of the late Lord Eddie George, when Governor of the Bank of England, together with the then Lord Mayor and the Chairman of the Financial Services Authority, Howard Davies. HotC works to encourage City businesses to extend their corporate social responsibilities and to "put something back" into the surrounding community. It aims to enable businesses in the City and adjoining boroughs to learn from one another to create prosperous, healthy and sustainable communities through the development of socially responsible programmes.

It should be stated at the outset that whilst HotC has close links with the City Corporation, it is a wholly independent registered charity and a company limited by guarantee, with its own board of governors and advisory council. Only one of the ten trustees is a Corporation nominee and only two of the 25 members of the advisory council are Corporation representatives.

HotC's activities include its Newcomers Programme, an 18-month programme that encourages businesses new to Corporate Social Responsibility (CSR) to develop and implement CSR programmes. Businesses that complete this programme are then invited to join its Alumni Programme upon 'graduation'. There are currently over 600 businesses in its network, including more than 450 Alumni businesses.

**Funding History**

In September 2009, you awarded a grant of £157,500 over three years towards the salary and associated running costs of a Project Manager, leading its Newcomers Programme. This grant is due to end in June 2013 and you are now asked to fund the post for a further two years.

### **Current Application**

Over the next two years, HotC will aim to recruit 50 new businesses to engage with its 18-month CSR programme, through its recruitment breakfasts that attract approximately 200 Chief Executives. All of those joining the programme will receive tailored, personalised support from the Project Manager. HotC Newcomers are linked up with businesses that have existing CSR policies (HotC's "Contributors") in order to share best practice. By helping businesses to develop quality CSR programmes, HotC enables voluntary organisations and local communities within the City fringe boroughs to harness the expertise of their local business community.

During 2011/12, Deloitte LLP undertook a strategic review of the quality of the programme. 97% of HotC's business members would recommend its services to clients or colleagues; 95% rated HotC's workshops as 'good' to 'excellent' and 90% rated HotC's CSR toolkits as 'good' to 'excellent'.

### **Financial Observations**

Audited accounts for the year ended 31<sup>st</sup> March 2012 show a surplus of £64,486 (10.4% of turnover). The income and expenditure figures include contributions in kind valued at £355,468. This relates primarily to the time spent by HotC's business supporters in assisting with programme promotion and delivery. It also includes £61,485 worth of governance costs, including costs associated with trustees meetings, auditor's fees and additional time given by HotC's trustees, over and above the quarterly Board meetings.

The charity's reserves policy, as set out in its 2011/12 annual report, does not state a specific amount to be held though it notes that reserves are to be held for wind-down purposes. During the assessment meeting it was explained that the Board has agreed that it requires a reserve of three months' operating costs which it calculates to be £90,000. As at 31<sup>st</sup> March 2012, unrestricted free reserves totalled £128,036, an excess of £38,036 above the required holding. A recent forecast for the current year to 31<sup>st</sup> March 2013 shows a further surplus of £84,500.

During 2013/14, HotC plans to utilise some of its free reserves for additional activities, including the engagement of an Events and Communications Manager to help it develop its Alumni programme over the coming year.

### **Officer's Appraisal**

Whilst three years is the maximum period that you will usually fund a project or activity, your current policies allow you to consider funding for a further two years, work which is of particular strategic importance to London. Given HotC's unique position as a bridge between businesses and



the local communities where they are based, officers are of the view that the work of HotC meets this criterion.

The Newcomers programme has been dependent on grant funding since its inception. In order to become more sustainable HotC plans to introduce a paid-for service for its Alumni Programme over the next two years which will then be used to subsidise the Newcomers programme.

Monitoring of the grant currently held has been of a high standard. A final report will be due when the current grant ends in June. If you approve a grant today it is, therefore, recommended that it be conditional upon receipt of a satisfactory final monitoring report.

### **Recommendation**

**£108,000 over two years (£51,000; £57,000) towards the full-time salary and associated running costs of a Project Manager.**



# The City Bridge Trust

Charity Registration Number: 1035628

## Working with Londoners: Application for a grant

Please read the guidance notes before completing this form

Reference:  
(office use only)

11640

Date Received:

4.2.13

Programme  
Area: 7

### 1. About your organisation

Name of organisation applying for grant:

**Heart of the City**

If the organisation is part of a larger organisation, what is its name?

**None but hosted by City of London Corporation**

Address for correspondence

**Guildhall, PO Box 270, London**

RECEIVED  
The City Bridge Trust

04 Feb 2013

Box

Postcode: **EC2P 2EJ**

Is this your home address? **No**

Contact person:

**Ms Carolyn Housman**

Position:

**Director**

Phone: **02073323745**

Fax:

E-mail: **carolyn.housman@cityoflondon.gov.uk**

Website: **www.theheartofthecity.com**

Legal status of organisation: **charity**

If registered, please give charity number: **1117212**

Year and month organisation established: **December 2006**

### 2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)?

**Strengthening the Third Sector**

Purpose for which funds are requested: (25 words maximum)

**To extend the funding of our City fringes Newcomers Programme in order to give us the flexibility to build a sustainable, self-funding model. Y2 includes provision for final research report on impact.**

How much funding is requested?

**Year 1: £51,227 Year 2: £57,413 Year 3: £**

**Total: £108,640**

### 3. Aims of your organisation

Heart of the City's Mission is to enable businesses in the City and City fringes to learn from one another how to create prosperous, healthy and sustainable communities through the development of voluntary and socially responsible programmes.

The four key AIMS which support the delivery of its Mission are:

1. To inspire businesses that are new to the area of Corporate Social Responsibility ('CSR') to get started;
2. To provide practical support, through our NEWCOMERS' PROGRAMME, to these businesses to help them build sustainable programmes of engagement;
3. To raise awareness of effective of CSR programmes by showcasing good practice;
4. To maximise the reach and impact of the programme by inspiring the ongoing commitment of current and future funders and our business volunteers.

### 4. Main activities of your organisation

1. Delivery of our Newcomers Programme to encourage businesses without Corporate Social Responsibility programmes to start them.
2. Monitoring our our Newcomers Programme impact on business.
3. Delivery of a broker-lite pilot to encourage greater involvement from small to medium-sized enterprises in employability education to young people aged 12 to 19 years-old.
4. Delivery of an Alumni Programme for graduating Newcomers to ensure they continue to engage in the community and on relevant community themes, as well as to fund future cohorts of Newcomers.

### 5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
4		10	100

### 6. How do you support your volunteers?

We meet each volunteer on a 1-1 basis at least once p.a. to see how we can best support them. We run one large volunteer event p.a. to talk to them collectively and have ongoing dialogue with each one through their individual support for our work.

### 7. Property occupied by your organisation

Is the main property owned or leased/rented by your organisation?	If leased/rented, how long is the outstanding lease/rental agreement?
no	n/a

## 8. Finance

From your most recent audited or independently examined accounts, complete the following:

Financial year ended -

Month: **March**

Year: **2012**

Income received from:	£
Voluntary income	622,622
Activities for generating funds	0
Investment income	0
Income from charitable activities	0
Other sources	0
<b>Total Income</b>	<b>622,622</b>

Expenditure:	£
Charitable activities	496,641
Governance costs	61,495
Cost of generating funds	0
Other	0
<b>Total Expenditure</b>	<b>558,136</b>
<b>(Deficit)/surplus for the year:</b>	<b>64,486</b>

Asset position at year end	£
Fixed assets	
Investments	
Net current assets	148,479
Long-term liabilities	
<b>*Total A</b>	<b>148,479</b>

Reserves at year end	£
Endowment funds	
Restricted funds	20,443
Unrestricted funds	128,030
<b>*Total B</b>	<b>148,479</b>

\* Total A and Total B must be the same and should be taken from your balance sheet

## 9. Statutory funding

For the financial year above, what % of your income was from statutory sources?  
33%

## 10. Material changes

Describe any material changes to the organisation's activities, structure or financial position since the date of the most recent accounts:

Heart of the City will be launching a paid-for service in early 2014 which we expect will significantly enhance our ability to self-fund our programme. We also have received funding from businesses to deliver an employability education programme to SMEs. See extra 'Purpose' attachment for explanation of reserves.

## 11. Previous applications to the Trust

Have you applied to the Trust before? If so, please give details:					<input checked="" type="checkbox"/>
Month/Year: May	/ 2009	Ref: 9580	Grant received: £157,500	OR application rejected	<input type="checkbox"/>
Month/Year: -	/ -	Ref:	Grant received: £	OR application rejected	<input type="checkbox"/>
Month/Year: -	/ -	Ref:	Grant received: £	OR application rejected	<input type="checkbox"/>

## 12. Previous funding received

Funding received by your organisation from the following sources during the last **THREE** years:  
**(i)** City of London (other than the City Bridge Trust)**(ii)** London boroughs **(iii)** London Councils (formerly ALG)  
**(iv)** Health authorities **(v)** Central government departments **(vi)** Other statutory bodies (e.g. Housing Corporation, Arts Council) - List source, years and annual amounts:

	Year: 2010	Year: 2011	Year: 2012
(i) City of London Corporation	189,000	198,000	207,000
(ii)			
(iii)			
(iv)			
(v)			
(vi)			

## 13. Previous grants received

Grants received by your organisation from charitable trusts and foundations (other than the City Bridge Trust) during the last **TWO** years. List source, years and annual amounts:

	Year: 2011	Year: 2012
private sector employability pilot		55,000
Private Foundation (Peter Sherratt)		5,000

## 14. What steps is your organisation taking to reduce its carbon footprint?

- We use recycling bins, double-sided printing and print two pages to one side of paper
- We have very little printed material and instead ensure all our marketing materials are downloadable from our website. Any printed material we do use is laminated for presentation purposes and therefore re-usable
- We take notes at meetings on our computer rather than in notebooks, saving paper
- We ensure all our computers are switched off at night
- We use public transport whenever possible
- We are based at the City of London Corporation and therefore link into and adhere to its sustainability programmes, including playing an active role in the City environmental forum and in the CoLC sustainability group

## 15. Purpose

Complete this section whatever the amount of grant requested. **In addition**, if the request is for £25,000 or more in total, a fuller proposal should be sent with this form. Also, if your application is for all or part of new or existing post(s), please enclose a copy of the relevant job description(s) including the salary level.

**In order to provide the right information, please refer to guidance note 15 before completing this section.**

Heart of the City's purpose is to create a sustainable society by changing and improving the system of small business engagement with local communities. Our model is simple: to transfer learnings from companies with robust, impactful community and environmental programmes to those which do not currently have them. This model, known as the 'Newcomers programme', takes shape through freely accessible tailored workshops of practical advice, an online portal of best practice tools and resources, Project Manager support and business-to-business mentoring. We work with traditionally 'sceptical' business leaders in order to create real change in their operations. We also target small to medium-sized enterprises without the resource to consider these issues in a structured or comprehensive manner. We know our model works as demand for our services is unprecedented and our impact on the community continues to grow and attract attention. The delivery of our Programme in the City fringes (Hackney, Tower Hamlets, Camden, Islington, Southwark, Lambeth and Westminster) is particularly important as it is an area containing significant levels of deprivation, with nearly 5,000 chairites in need of support and a high concentration of businesses (over 128,000).

Although our Newcomers Programme has been running in the 'City fringes' since 2008, we do not have a reliable source of funding to continue this free programme. Over the course of 2013 and 2014, we will be setting up a paid-for alumni service, the revenue from which will be used to fund the Newcomers Programme. We are seeking assistance from City Bridge Trust to help us deliver the free Newcomers Programme in the City fringes for two years while we get our Alumni Programme up and running.

With the City Bridge Trust funding, we will have six objectives: 1. To increase awareness in the private sector of the importance of supporting the third sector (thus exponentially increasing positive impact in the community); 2. To increase awareness in the private sector of the need to reduce carbon emissions (thus significantly decreasing carbon emissions); 3. To strengthen the third sector by channelling business support where the need is; 4. To improve the evaluation of not only our own services but also other third sector organisations through the education of their business partners; 5. To strategically use ICT to improve our services and to share our learning with other third sector organisations; 6. To build a self-funding model so that we have sustainable charitable operations.

A full set of measurable outputs and outcomes is set out in the attached Purpose.\*

\* on file

**16. Explain how you will monitor and evaluate both your own outcomes and those of the programme under which you are applying.**

We have an entrenched culture of evaluation and are continuously improving our monitoring through the strategic use of ICT. To measure the outputs and outcomes from our Newcomers Programme, we will set up a baseline against which we will measure our progress at the end of the two years. We capture all resulting data on our database so we can run reports against a range of themes eg levels of volunteering, types of organisations supported, sustainability systems introduced etc. We can adapt and add to these questions to ensure that the outcomes relevant to this grant programme can also be measured. We will happily share data from our latest reporting round with you if it would be helpful.

To further measure our ability to strengthen the third sector, we will track the number and type of charities to which we give advice and the number of business referrals we make. We will also collect data on the quality of our engagement and our delivery of service.

At the end of Year 2, additional funds have been requested to do a full, cumulative evaluation of our work and our impact. This will be shared with our business supporters and our third sector colleagues.

**17. Beneficiaries**

How many people will benefit from the grant per year? **approx 10,000 directly affected through CSR programmes; more indirectly.**

In which local authority is your organisation based?  
**City of London**

Which borough(s) of Greater London will benefit from this grant?  
(if more than one, please give % for each)  
**Tower Hamlets, Hackney, Islington, Camden, Southwark, Westminster, Lambeth. Exact proportion is not known until we begin our recruitment.**

At what address will the activity be located? **City and surrounding boroughs**

What age group will benefit? **All ages - both staff within the businesses engaged and the service users of their community partner organisation**

What will the ethnic grouping(s) of the beneficiaries be?

	%		%
White - British		Black - Caribbean	
White - Irish		Black - African	
White - Other (please describe)		Black - Other (please describe)	
Asian - Indian		Black - British	
Asian - Pakistani		Chinese	
Asian - Bangladeshi			
Asian - Other (please describe)		Other (please describe)	
Open to everyone			<b>100</b>

What proportion of the beneficiaries will be disabled people?  
**Not known.**

## 18. Funding required for the project

What is the total cost of the proposed activity/project?  
(List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Total Cost of Newcomers Programme:				
1. Staff of 4, plus on-costs	211,227	213,413		
2. Programme delivery costs	303,000	303,000		
3. General Office costs	30,000	35,000		
<b>TOTAL</b>	<b>544,227</b>	<b>545,000</b>		<b>1.08M</b>

What income has already been raised?  
(List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
City of London Corporation	193,000	194,000		387,000
Business volunteers (in-kind; approx)	300,000	300,000		600,000
<b>TOTAL</b>	<b>493,000</b>	<b>494,000</b>		<b>987,000</b>

What other funders are currently considering the proposal?

Garfield Weston

## 19. Funding requested from the Trust

How much is requested from the Trust? (List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Salary and on-cost	46,227	47,413		93,640
Office costs (15% of total overhead)	5,000	5,000		10,000
research on impact		5,000		5,000
<b>TOTAL</b>	<b>51,227</b>	<b>57,413</b>		<b>108,640</b>



## 20. Funding requested from the Trust (continued)

When will the funding be required? **July 2013 (current funding runs out in June 2013)**

Is the activity to continue beyond the period for which funding is requested?

If so, how will it be resourced? **Staff member is on fixed-term contract, however we are building a self-funding model through our alumni programme (which will charge fees).**

If any planning or other statutory consents are required for the project to proceed, what stage have the applications reached? **n/a**

### Declaration on behalf of applicant organisation

I, **Carolyn Housman** (your name)

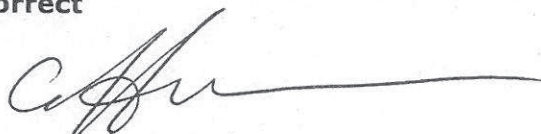
am an authorised representative of

**Heart of the City** (your organisation)

within which I am **Director** (your position)

**To the best of my knowledge, all the information that I have provided in this application form is correct**

Signature



Date

18/09/2013

**Return the completed form to: The City Bridge Trust**

City of London

PO Box 270

Guildhall

London EC2P 2EJ

Please

- **do not send this application by fax or e-mail** – unless applying online, applications must be posted to the Trust
- **do send the information in the checklist** – if items are missing, your application will be returned to you
- **do send only the information in the checklist** – if further information is required, we will contact you
- **do ensure you have signed and dated this form** – we cannot accept forms which have not been signed and dated
- **do use the correct postage** – the completed form and additional materials are likely to exceed 100g in weight

**ASSESSMENT CATEGORY - Strengthening the Third Sector**

**Forum for Health and Wellbeing**

**Ref: 11438**

**Adv: Joan Millbank**

**Amount requested: £58,886**

**Base: Newham**

**Benefit: Newham**

**Purpose of grant request:** To establish 'Ready to Deliver', an accredited black and minority ethnic partnership to deliver health improvement services for people with or at risk of diabetes and heart disease.

**Background**

Forum for Health and Wellbeing (FHW) was set up in 1991 to develop a network of Black, Asian and minority ethnic (BAME) users and provider groups in Newham; a borough marked by high indices of poverty and cultural diversity. Over the years it has positioned itself as the strategic voluntary agency for BAME health and social care issues in Newham; it sits alongside health commissioning bodies in planning and reviewing provision. It gives voice to BAME service users and communities of interest, and provides capacity building support to Newham's 600+ BAME provider groups. FHW hosts and supports Newham LINK (sic), the local health involvement network. FHW is seeking to broaden its reach across London, where it has bid for contracts in collaboration with local voluntary organisations to provide the new 'Health Watch' service within the City of London and three East London Boroughs from April 2013.

FHW has developed a Communities of Health Framework (CoHF) to enable local community-based health and social care groups to gain recognition for their work and to provide for continuous improvement in their service provision. The framework has attracted interest from others, and won a national award in the Liberating Ideas National Prevention Category 2010, an award given by Capgemini consultancy and the Health Service Journal.

**Funding History**

You awarded a grant of £32,400 in May 2005 to strengthen and support Newham-based Black and Minority Ethnic community groups and voluntary organisations. The grant was satisfactorily monitored.

**Current Application**

FHW is seeking your support for its 'Ready to Deliver' initiative. It is seeking two year match funding to provide targeted capacity building and partnership development support to 30 BAME groups to provide health promotion and self-management services for approximately 680 residents with and at risk of diabetes and cardiovascular disease in Newham. Groups will be supported to achieve CoHF accreditation in order to become recognised providers by the Newham Clinical Commissioning

Group, the new health procurement body from April 2013. They will also be supported to form partnerships in order to provide a route for small BAME groups to access and secure commissioned funding. Skills and knowledge will be built through the provision of one-to-one support, group training and partnership learning sets, and the dissemination of up-to-date information via e-bulletins, social media and project website.

The approach has been endorsed by the emerging Newham Clinical Commissioning Group, which is investing £400,000 in FHW over two years to support BAME groups to provide tailored support to local residents in preventing and managing ill health. The Commissioning Group has indicated that funding could be extended to 10 years. A toolkit will be developed to share learning and, if successful, the model will be used to mainstream the approach, involve BAME groups in meeting other areas of clinical need within Newham and provide a model for other North East London boroughs.

### **Financial Observations**

The audited accounts for the year ending 31<sup>st</sup> March 2012 show income of £617,892 and an end-of-year surplus of £38,734 (6.3% turnover). The reserves policy states that it aims to hold 20% of the organisation's annual income in reserve, equating to £123,600 in the year. At 31<sup>st</sup> March 2012 free undesignated reserves stood at £127,539, which is on target. The balance sheet shows that the organisation held £181,203 cash against creditors of £35,213.

For 2012-13 FHW set a balanced budget with expenditure of £587,719; all income has been secured and expenditure is on course. The 2013-14 draft budget shows a break-even position with estimated expenditure of £886,000.

### **Officer's Appraisal**

The need for the project arises from changes in local health commissioning arrangements set out in the Health and Social Care Act 2012, health inequalities within Newham (BAME communities are at particular risk of diabetes and cardiovascular disease) and the challenges faced by BAME organisations too small and/or inexperienced to secure contract funding. Ready to Deliver provides a timely and creative way of building the capacity of Newham's BAME organisations and positioning the sector to meet the needs of its diverse communities in the new funding regime.

### **Recommendation**

**£58,900 over two years (£29,800; £29,100) towards a salary of a part time (18 hpw) Partnership Development Officer and on-costs required to establish Ready to Deliver.**



# The City Bridge Trust

Charity Registration Number: 1035628

## Working with Londoners: Application for a grant

Please read the guidance notes before completing this form

Reference:  
(office use only)

11438

Date Received:

10/10/2012

Programme  
Area:

07

### 1. About your organisation

Name of organisation applying for grant: <b>Forum for Health and Wellbeing</b>	
If the organisation is part of a larger organisation, what is its name? <b>Not Applicable</b>	
Address for correspondence: <b>St Marks Community Centre Tollgate Road Beckton, London</b>	
Postcode: <b>E6 5YA</b>	
Is this your home address? <b>No</b>	
Contact person: <b>Mr. Aidan Keightley</b>	Position: <b>Deputy Director</b>
Phone: <b>020 7055 5970</b>	Fax: <b>020 7474 3356</b>
E-mail: <b>aidan.keightley@bemccf.org.uk</b>	
Website: <b>http://www.bemccf.org</b>	
Legal status of organisation: <b>Registered Charity</b>	
If registered, please give charity number: <b>1118229</b>	
Date organisation established: <b>30/06/1991</b>	

*RECEIVED*  
The City Bridge Trust  
**12 OCT 2012**  
*mt*

### 2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? <b>Strengthening the Third Sector</b>
Purpose for which funds are requested: (25 words maximum) <b>To establish an accredited black and minority ethnic partnership to deliver health improvement services for people with or at risk of diabetes and heart disease.</b>
How much funding is requested? <b>Year 1: £29,793 Year 2: £29,093 Year 3: £0 Total: £58,886</b>

### 3. Aims of your organisation

#### Charitable Purpose

"To improve the health and wellbeing of primarily black and ethnic minority individuals and communities through the delivery of effective challenge and solutions, thus enabling the statutory, voluntary and community sectors to create accessible, user defined services and ways of working."

#### Aims:

- \* To ensure services effectively meet the health and social care needs of all but particularly black and ethnic minority communities by supporting at all levels of decision making and by campaigning,, researching and advocating for provision that meets the needs and aspirations of all
- \* To develop and facilitate a strong, collective and informed voice of voluntary groups, service users and carers, which defines issues, provides solutions both by supporting effective networks and providing accessible, relevant information.
- \* To capacity build the black and ethnic minority third sector enabling them to deliver their own health and social care services by providing tailored development support, access to funding, brokerage of partnerships and the identification of opportunities.

### 4. Main activities of your organisation

#### Four Cornerstones

1. Challenge with Solution --. We have a seat on all Newham's health and social care strategic decision making bodies as the recognised third sector representative. We are also the host for Newham Local Involvement Network, (LINK) and for the social care Co-Production Partnership ensuring effective representation of patients and social care users views.
2. Meaningful involvement -- Effectively engaging service users and carers in the planning, delivery and evaluation of services and supporting them to be representatives through consultation events and focus groups; recruiting, supporting, training and succession planning for representatives; assisting. national and regional organisations to engage with diverse communities.
3. Resilient communities - We assist primarily black and ethnic minority communities to fulfil their potential by providing capacity building services to develop internal systems, structures and sustainable strategies; one to one fundraising advice, training and partnership brokerage.
4. Building the Evidence - Ensuring an evidence base for our work by ensuring evaluation is factored in at the planning stages of our projects and services, undertaking research into the needs and solutions and delivering pilots .

### 5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
<b>9</b>	<b>2</b>	<b>7</b>	<b>10</b>

### 6. How do you support your volunteers?

- Volunteer policy developed and reviewed with volunteers
- Robust recruitment and induction, aligning volunteer aspiration to meaningful tasks.
- Clear task descriptions along with personal development plans, including training
- Agreed Reward and Recognition mechanisms
- Inclusion of volunteers within internal communication and consultation

### 7. Property occupied by your organisation

Is the main property owned or leased/rented by your organisation?	If leased/rented, how long is the outstanding lease/rental agreement?
<b>Rented</b>	<b>3 years</b>

## 8. Finance

From your most recent audited or independently examined accounts, complete the following:

Financial year ended -

Month: **March**

Year: **2012**

<b>Income received from:</b>	<b>£</b>
Voluntary income	85,913
Activities for generating funds	0
Investment income	75
Income from charitable activities	531,904
Other sources	0
<b>Total Income</b>	<b>617,892</b>

<b>Expenditure:</b>	<b>£</b>
Charitable activities	567,515
Governance costs	11,643
Cost of generating funds	
Other	0
<b>Total Expenditure</b>	<b>579,158</b>
<b>(Deficit)/surplus for the year:</b>	<b>38,734</b>

<b>Asset position at year end</b>	<b>£</b>
Fixed assets	5,206
Investments	0
Net current assets	151,590
Long-term liabilities	0
<b>*Total A</b>	<b>156,796</b>

<b>Reserves at year end</b>	<b>£</b>
Endowment funds	0
Restricted funds	14,000
Unrestricted funds	142,796
<b>*Total B</b>	<b>156,796</b>

\* Total A and Total B must be the same and should be taken from your balance sheet

## 9. Statutory funding

For the financial year above, what % of your income was from statutory sources?  
70%

## 10. Material changes

Describe any material changes to the organisation's activities, structure or financial position since the date of the most recent accounts:

N/A

## 11. Previous applications to the Trust

Have you applied to the Trust before? If so, please give details:

Month/Year:	2011	Ref:	0	Grant received:	£244,290	OR application rejected?	Yes
Month/Year:	6/05	Ref:	6353	Grant received:	£32,400	OR application rejected?	No
Month/Year:	6/03	Ref:	3120	Grant received:	£62,000	OR application rejected?	No

## 12. Previous funding received

Funding received by your organisation from the following sources during the last **THREE** years:  
**(i)** City of London (other than the City Bridge Trust) **(ii)** London boroughs **(iii)** London Councils (formerly ALG)  
**(iv)** Health authorities **(v)** Central government departments **(vi)** Other statutory bodies (e.g. Housing Corporation, Arts Council) - List source, years and annual amounts:

	Year: 2009	Year: 2010	Year: 2011
(i)			
(ii) London Borough of Newham	177,037	172,611	214,502
(iii) London Development Agency	154,886	57,006	0
(iv) NHS Newham	109,064	108,480	132,039
(v)			
(vi)			

## 13. Previous grants received

Grants received by your organisation from charitable trusts and foundations (other than the City Bridge Trust) during the last **TWO** years. List source, years and annual amounts:

	Year: 2010	Year: 2011
Big Lottery Fund	84,397	133,920
New Choices for Youth	0	16,200

## 14. What steps is your organisation taking to reduce its carbon footprint?

A regularly reviewed policy that sets out how we

- Reduce energy wastage and inefficiencies, cut back on overall energy use and reduce impact by sourcing renewable energy
- Reduce travel by eliminating unnecessary journeys including holding events at venues near public transport, choosing and supporting use of sustainable transport and providing guidance on minimizing impact on cars
- Use venues and suppliers that can demonstrate a commitment to reduce their impact
- Maximize use of IT to support a paperless office and for promotion
- Ensure we recycle and reuse our materials
- Using local sources and fair-trade food option
- Train and develop staff, volunteers, users and partner organizations
- Set objectives and monitor and evaluate our impact

## 15. Purpose

Complete this section whatever the amount of grant requested. **In addition**, if the request is for £25,000 or more in total, a fuller proposal should be sent with this form. Also, if your application is for all or part of new or existing post(s), please enclose a copy of the relevant job description(s) including the salary level.

**In order to provide the right information, please refer to guidance note 15 before completing this section.**

From March 2013 Clinical Commissioning Groups (CCGs), headed by GPs will want new relationships with the third sector and new ways of evidencing impact. In Newham the CCG has committed to commissioning accredited third sector organisation to deliver a pathway of ill health preventative and health maintenance support through a patient tracked, locality based model of social prescription. Offering 5 interlinked services of nutrition, exercise, self-help, health promotion and well-being the accredited voluntary groups will eventually find their funding following the patient. This change requires business acumen and organisational capacity amongst organisations that, whilst being able to provide culturally diverse and tailored services, tend to be smaller and under resourced. This proposal will establish a skilled partnership with the range of services required for accreditation and commissioning. One of the poorest London boroughs, Newham's population dies younger and experiences some of the highest incidents of ill health. With a steering group of stakeholders The Forum has, through desk top research and consultation events/interview with over 50 people, ensured the relevance and impact of the project and subsequent partnership .

A comprehensive capacity building and partnership development support project for black and ethnic minority community organisations based in Newham to enable them to achieve accreditation and provide the pathway of care required by NCCG. We will provide support through four distinct but interlinked strands,:

1. Tailored recruitment of 40 potential partners followed by a comprehensive workshop induction and organisational baseline assessment. 30 partners will pledge to participate on basis of an organisational and partnership development plan.
2. Organisational Development to enable 30 individual partners to achieve Communities of Health Accreditation
3. Development of a partnership agreement, through group training and partnership facilitation, establishing joint purpose, work methodology, responsibilities, accountabilities and resource allocation
4. Using monitoring and evaluation to develop and disseminate a partnership and social prescription toolkit for the voluntary sector and CCGs

Employing a part time Partnership Development officer who will be responsible for strands 1, 3, and 4 above and support of the project steering group we will ensure.

40 individuals from organisations will report increased skills, knowledge and capacity including better awareness of support within the community and how to use techniques to improve organisational performance

30 organisations will have an improved understanding, experience and therefore confidence in undertaking collaborative working to achieve better outcomes.

30 organisations have increased reputation and networks within the local health system and are better able to inform the statutory sector decision making.

300 people with or at risk of contracting diabetes and cardiovascular disease will experience an improvement in the services they receive from supported organisations

The Forum

- A 19 year track record of successful delivery in health and social care including brokering productive partnerships and national awards
- Is based in and from black and minority communities
- Has strong supportive relationships with all key stakeholders
- An evidence base to work resulting in service improvements and increased capability
- Is accredited itself, 10 years Investors in People

The project specifically will assist minority ethnic and refugee community organisations become more sustainable through individual support and accreditation and to work more collaboratively in delivering health and care services in a manner that will be commissioned in the future.. Our commitment to each principle is set out in a specific policy and procedure and is underpinned by training and development of staff and volunteers, within our capacity building work, partnership arrangement and as part of our service and organisational monitoring/evaluation. Ready to Deliver will use this method within its work and is being specifically develop to promote diversity and share learning.



**16. Explain how you will monitor and evaluate both your own outcomes and those of the programme under which you are applying.**

Outcomes established with the Project Steering Group, including those that measure Funding Programme impact will inform key performance indicators that will be a key element of our project plan review and a performance dashboard for reporting back to the Steering Group, the management committee and funders. The collection of information to support reports against indicators will be the responsibility of the staff member and the partner organisations with agreed clarity on the frequency and nature of what is to be collected as part of their commitment to be involved in the project and the partnership agreement. This computer held information will be drawn from qualitative and quantitative sources, for example numbers, profile and satisfaction with training. Reports will feature interpretation of data underpinned by quarterly internal and an independent evaluation with beneficiaries and stakeholders. The Steering Group will assess success, mitigate risk and test their impact conclusions with communities themselves.

**17. Beneficiaries**

How many people will benefit from the grant per year? <b>340</b>			
In which local authority is your organisation based? <b>Newham</b>			
Which borough(s) of Greater London will benefit from this grant? (if more than one, please give % for each) <b>Newham</b>			
At what address will the activity be located? <b>St Mark's Community Centre, Tollgate Road, Beckton, London E6 5YA</b>			
What age group will benefit? <b>Adult, All</b>			
What will the ethnic grouping(s) of the beneficiaries be?			
	<b>%</b>		<b>%</b>
White - British		Black - Caribbean	<b>12</b>
White - Irish		Black - African	<b>36</b>
White - Other (please describe)		Black - Other (please describe)	
Asian - Indian	<b>17</b>	Black - British	<b>12</b>
Asian - Pakistani	<b>23</b>	Chinese	
Asian - Bangladeshi			
Asian - Other (please describe)		Other (please describe)	
			Open to everyone
What proportion of the beneficiaries will be disabled people? <b>60%</b>			

## 18. Funding required for the project

What is the total cost of the proposed activity/project?

(List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Staff salaries (inc NIC)	136,893	136,893		273,786
Management (supervision and finance & admin)	29,500	29,500		59,000
Operating costs				
Staff operating costs (travel, training)	4,950	4,950		9,900
Rent, rates	12,300	12,300		24,600
Photocopying, stationery, post	3,700	3,700		7,400
Telephone, broadband	3,600	3,600		7,200
Fees (Governance, IT, Audit, Insurance)	4,950	4,950		9,900
Project costs	33,900	33,200		67,100
<b>TOTAL</b>	<b>229,793</b>	<b>229,093</b>		<b>458,886</b>

What income has already been raised? (List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
Newham Clinical Commissioning Group	200,000	200,000		400,000
<b>TOTAL</b>	<b>200,000</b>	<b>200,000</b>		<b>400,000</b>

What other funders are currently considering the proposal?

Funder	£
<b>TOTAL</b>	

## 19. Funding requested from the Trust


How much is requested from the Trust? (List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Salary - 1 p/t post inc NIC	17,043	17,043		34,086
Project running costs				0
Partnership development activities	4,000	4,000		8,000
Partnership meeting costs	1,250	1,250		2,500
Project promotion	1,400	700		2,100
Overhead costs (including supervision and finance & admin fees)	6,100	6,100		12,200
<b>TOTAL</b>	<b>29,793</b>	<b>29,093</b>		<b>58,886</b>

## 20. Funding requested from the Trust (continued)

When will the funding be required? <p style="text-align: center;"><b>01/04/2013</b></p>
Is the activity to continue beyond the period for which funding is requested? If so, how will it be resourced? <b>The development and accreditation of the partnership will enable it to meet commissioner's intentions to purchase a comprehensive health improvement service from Newham's third sector. The robust nature of the partnership will enable it to effectively tender for this opportunity and to apply for other funds as part of an agreed fundraising strategy.</b>
If any planning or other statutory consents are required for the project to proceed, what stage have the applications reached? <b>Not applicable</b>

### Declaration on behalf of applicant organisation

I, Sahdia Warraich _____ (your name)
am an authorised representative of
The Forum for Health and Wellbeing _____ (your organisation)
within which I am Director _____ (your position)
<b>To the best of my knowledge, all the information that I have provided in this application form is correct</b>
Signature  _____ Date 11 <sup>th</sup> October 2012

**Return the completed form to: The City Bridge Trust**  
City of London  
PO Box 270  
Guildhall  
London EC2P 2EJ

Please

- **do not send this application by fax or e-mail** – unless applying online, applications must be posted to the Trust
- **do send the information in the checklist** – if items are missing, your application will be returned to you
- **do send only the information in the checklist** – if further information is required, we will contact you
- **do ensure you have signed and dated this form** – we cannot accept forms which have not been signed and dated
- **do use the correct postage** – the completed form and additional materials are likely to exceed 100g in weight

<b>Committee(s):</b>	<b>Date(s):</b>	
The City Bridge Trust	18 <sup>th</sup> April 2013	ANNEX N <sup>o</sup> 17
<b>Subject:</b> Strategic Initiative – Centre for Accessible Environments Advisory Service	<b>Public</b>	
<b>Report of:</b> Chief Grants Officer	<b>For Decision</b>	
<b><u>Summary</u></b>		
<p>This paper seeks your approval to continue funding the Centre for Accessible Environments to provide an Access and Sustainability Advice Service for a period of three years, from July 2013, to be funded from your 2013/14 allocation for Strategic Initiatives.</p>		
<b>Recommendation</b>		
<p>That you approve a sum of £192,900 over three years (£65,000; £62,800; £65,100) to continue an Access and Sustainability Advice Service, to be costed against your allocation for Strategic Initiatives 2013/14.</p>		

## 1.0 Purpose

- 1.1 This paper seeks your approval to commission the Centre for Accessible Environments to continue to provide an Access and Sustainability Advice Service over the next three years, from July 2013, for the benefit of applicants to your *Access to Buildings* programme and for the wider third sector in London.

## 2.0 Background

- 2.1 Since December 2005, you have commissioned the Centre for Accessible Environments (CAE) to provide an Access and Sustainability Advice Service in order to support applicants to your

*Access to Buildings* programme as well as the wider third sector in London.

- 2.2 You asked CAE to create the post delivering this service because applicants to your *Access to Buildings* programme often found it difficult to secure the full range of good quality advice and information needed when making access improvements. There was a great need for information on areas such as what an access audit is; how to find an access auditor; finding and appointing architects and quantity surveyors; what is liable for VAT; and disability equalities training. "*Sustainability*" was built into the job title in order to encourage organisations to consider the environmental impact of their buildings at the same time as when considering making access improvements.
- 2.3 This service is one of several specialist projects you fund in order to underpin and add value to your wider grant-making. These include your support for Charities Evaluation Services; the London Property Service at Ethical Property Foundation; the Cranfield Trust; and the Media Trust.
- 2.4 In 2007, you published '*Opening Doors Across London*' as a result of an evaluation of your *Access to Buildings* programme. Although it showcases examples of good practice, it also illustrates just how stressful managing a building project can be, especially for smaller organisations and highlights the importance of accessing good quality advice and information.
- 2.5 The postholder provides a much needed 'hand-holding' service from pre-application stage through to the completion of the building work, including site visits as required. She also provides workshops for third sector organisations on access and sustainability issues. The service is promoted on your website and applicants are encouraged to contact the postholder prior to submitting an *Access to Buildings* application.
- 2.6 We regularly receive feedback from organisations about the helpfulness of this service. Here are two typical examples:

*"The service gave excellent guidance on how to choose a surveyor to undertake our access audit. It was also good to have a second opinion on the access report produced."*

*"Wai-Mei (the postholder) has provided advice and information to us since 2010 until now, throughout our project to refurbish the new Crossroads Women's Centre. It began with help in appointing an access auditor in 2010 and has continued until after we moved in,*

our last meeting with her being in July 2012. We are very glad that City Bridge Trust established her post to support grantees undertaking building work, as this role is very much needed and greatly appreciated. ”

### **3.0 Current Position**

- 3.1 Your current funding for the post is due to end in June 2013 and this paper seeks your approval to commission the service for a further three years from July 2013. During early consultation on your Quinquennial Review, you agreed that you would continue to make grants towards access improvements to community buildings and officers are, therefore, of the view that the service will continue to be needed.
- 3.2 During 2012, the postholder worked with 95% of successful applicants applying on your *Access to Buildings* programme (compared with 47% in 2006). She also ran 12 workshops with an average attendance of 25 people.

### **4.0 Why the Centre for Accessible Environments?**

- 4.1 CAE is the only disability charity that focuses specifically on accessibility and the built environment. It was established in 1969 to provide information and advice on making the built environment accessible to everyone. CAE collects and disseminates information on accessible building design, advances the understanding of the access needs of disabled and older people, and promotes good practice in the improvement of the quality of building and product design for all.
- 4.2 In June 2012, it became a wholly owned subsidiary of Habinteg, a housing association that promotes accessible homes for life and independent living. This move cemented what had been a long working relationship and has strengthened Habinteg's inclusive design offer. CAE, in turn, has benefited from becoming part of the Habinteg family and the resulting reduction in overhead costs.
- 4.2 Since the move, CAE has been able to continue its core activities, which comprise: access consultancy, including access audits and drawing appraisals; publications and design guides; training; a library and website; a quarterly magazine, *'Access by Design'*; and one-off research projects, such as the accessibility of ATM machines. It was instrumental in establishing the National Register of Access Auditors (NRAA) and provides NRAA's administrative base. It is also a co-sponsor of the RIBA Inclusive Design award.

- 4.3 It has therefore amassed considerable expertise in this field. The Access and Sustainability Advice Service complements CAE's wider work and the postholder is able to draw on CAE's resources to inform and support her work.

## **5.0 Proposals**

- 5.1 If you agree to commission the service for a further three years, the postholder will continue to promote the service and the funding available from the Trust widely, including through workshops and other events and through various second tier bodies such as the CVS network. The postholder is also making increased use of social media, such as Twitter, Facebook and blogging.
- 5.2 She will continue to attend third sector networks, relevant to managing community buildings, such as the London Premises Subgroup (whose membership includes the Ethical Property Foundation, Locality, Planning Aid London and Community Matters). She will also continue to maintain links with local disability networks, including the London Access Forum. The promotion of this service reflects well on the Trust and its commitment to an inclusive London.
- 5.3 A number of building regulation changes are due to be implemented during 2013/14 and the postholder will therefore be involved in a radical overhaul and updating of the full range of publications, factsheets and webpages relating to accessible buildings. Topics range from best practice for accessible toilets; clarification about tax exemptions in relation to changes to Listed Buildings Exemptions; and recycling and sustainability development.
- 5.4 She will continue to encourage organisations to consider making their buildings more sustainable and to promote your Greening the Third Sector programme whereby you provide organisations with a free eco-audit.

## **6.0 Cost**

- 6.1 The total cost of providing the Access and Sustainability Advisory Service over the next three years is £192,900 (£65,000; £62,800; £65,100). This includes the salary and on-costs of the postholder; technical support from across the CAE team; publications; website development; line management and a contribution to core costs.
- 6.2 During the past three years you have awarded a total of £2.7m in grants under your Access to Buildings programme. The cost of

continuing the service for a further 3 years represents 7% of this sum.

- 6.3 The allocation for Strategic Initiatives for 2013/14 amounts to **£747,500**. This represents 5% of your total grants budget of £14,950,000 for 2013/14. If you approve funding to continue the Access and Sustainability Advisory Service for a further three years, the allocation remaining for the rest of this financial year will be £554,600.

## **7.0 Conclusion**

- 7.1 The Access and Sustainability Advice Service has grown into an extremely important element of your funding portfolio. It adds value to your grant-making by ensuring that those funded on your *Access to Buildings* programme have access to good quality advice and support.
- 7.2 As part of your Quinquennial Review, you have agreed that you wish to continue to make grants to help voluntary organisations make their buildings accessible. The need for organisations to continue to access good quality advice and support will therefore continue.
- 7.2 CAE is a leading authority on inclusive design in the UK and is ideally placed to host the Access and Sustainability Advisory Service over the next three years.

## **8.0 Recommendation**

**That you approve a sum of £192,900 over three years for an Access and Sustainability Advice Service, to be costed against your budget for Strategic Initiatives 2013/14.**

### **Contact:**

Jenny Field

Tel: 020 7332 3715

Email: [jenny.field@cityoflondon.gov.uk](mailto:jenny.field@cityoflondon.gov.uk)

Date report written: 03/04/2013



<b>Committee(s):</b>	<b>Date(s):</b>
The City Bridge Trust	18 April 2013
<b>Subject:</b> Applications recommended for rejection	<b>Public</b>
<b>Report of:</b> Chief Grants Officer	<b>For Decision</b>
<p><b><u>Summary</u></b></p> <p>This report and the accompanying schedule outlines a total of 29 grant applications that, for the reason(s) identified, are recommended for rejection.</p> <p><b><u>Recommendation</u></b></p> <p>That the grant applications detailed in the accompanying schedules be rejected.</p>	

## **Main Report**

1. There are a total of 29 applications recommended for rejection at this meeting – all under your Working with Londoners programme. They are listed within categories in the accompanying schedules. In each case the “purpose” that is used to describe the application is that provided by the applicant organisation. All the recommendations are based on criteria set out in your Policy Guidance. Although the number of applications may appear high this is because of there being no Committee meeting in March.
2. Copies of these application forms are available to view in the Members’ Reading Room. If any Committee Member wishes to query any of the recommendations, this can either be done at the meeting, in which case the decision may be deferred while full details are provided to the Member concerned, or by contacting the Trust office in advance of the meeting so that an explanation can be provided prior to or at the meeting.

**Contact:**

Ciaran Rafferty, Principal Grants Officer  
 020 7332 3712  
 Report written: 03/04/13

This page is intentionally left blank

# THE CITY BRIDGE TRUST

The City Bridge Trust Committee - 18 April 2013

## Summary of Recommendations for Rejection - Working with Londoners and Growing Localities

Ref & Organisation	Purpose	Reason for Recommendation for Rejection	Amount Requested	Grants Officer & Area
<u>Accessible London</u> 11528 Brixton Inclusive	A two year project to establish an Inclusive Youth Theatre Company which engages and encourages disability uptake for Black culturally diverse children and young people.	A small organisation heavily reliant on the local authority funding. It is not clear what funding if any has been secured for the coming year. From the information provided the organisation's request would make the Trust the largest funder which is not your policy.	£24,930	SD Lambeth
11626 St Matthew's Church Yiewsley PCC	Accessibility Audit	The time frame for the proposed capital development does not support the request for an access audit to inform the process.	£1,300	JXM Hillingdon
11623 Wallington Bowling Club Limited	Access audit of the clubhouse ground floor and externals	The applicant organisation is not constituted as a charitable body and therefore ineligible for consideration.	£954	SG Sutton
<i>Total Accessible London (3 items)</i>			<u>£27,184</u>	

<b>Ref &amp; Organisation</b> <b><u>Bridging Communities</u></b>	<b>Purpose</b>	<b>Reason for Recommendation for Rejection</b>	<b>Amount Requested</b>	<b>Grants Officer &amp; Area</b>
11620 Anti-Tribalism Movement	The Young Leaders 'Lead and be Led' project aims to develop 40 young Somalis and Arabs aged 18-25 from Inner London boroughs to enhance skills.	Poorly presented application which lacks sufficient detail as to the structure of the project. Proposal lacks credibility to achieve outcomes to meet your priorities.	£23,000	CR Ealing
11486 Arbour Youth Centre	The Empowerment and Leadership Project seeks to increase the social inclusion of newly-arrived women and empower them to act as leaders within their local communities.	This proposal is to work with and benefit adult women and is therefore outside the objects of the charity (to benefit children and young people).	£112,518	JXM Tower Hamlets
11579 Ardhmeria	ESOL classes focused on the needs of Albanian and Kosovan women and parents who face barriers in setting up families in the UK.	From the financial information provided, your Officer is not assured of the organisation's financial stability. Income has almost halved on the previous year.	£24,840	SD Wandsworth
11585 Croydon Refugee Day Centre	Salary for part-time co-ordinator	From the information available no other revenue income is either secured or being sought for the coming year. It is not your policy to make grants in these circumstances.	£24,500	SG Croydon

Ref & Organisation	Purpose	Reason for Recommendation for Rejection	Amount Requested	Grants Officer & Area
11386 Interfaith Action	To bring young people together from different faiths, cultures and communities - including the migrant community - to create a community art campaign exploring modern British identity.	From the information provided, it would seem that the organisation has more than sufficient funds in reserve to meet this expenditure.	£49,604	SG Camden
11453 Southbank Mosaics CIC	To develop Southbank Mosaics as a City & Guilds training centre and set up the London School of Mosaic.	Although this organisation works with a diverse client group, the application does not address the priorities of your Bridging Communities programme.	£94,520	JF Lambeth
11622 Youth Learning Network Ltd	Funding will support an educational programme in which volunteers from one minority ethnic community will tutor and mentor children and young people of another background.	A relatively small organisation where the requested sum would almost double the organisation's annual turnover, which is not your policy.	£25,000	SG Southwark

*Total Bridging Communities (7 items)*

£353,982

#### **Improving Londoners' Mental Health**

11590 BH Islamic Centre - London	To offer practical mental health support to the refugees experiencing mental distress.	This is a relatively small organisation with little experience of in-depth mental health work. A grant cannot therefore be recommended.	£24,000	SG Brent
-------------------------------------	--	---	---------	-------------

<b>Ref &amp; Organisation</b>	<b>Purpose</b>	<b>Reason for Recommendation for Rejection</b>	<b>Amount Requested</b>	<b>Grants Officer &amp; Area</b>
11612 CNWL NHS Foundation Trust Charitable Fund	Match funding to help create a music studio at the Gordon Hospital for community clients with psychosis. We need acoustic treatment and a piano.	This application seeks funds for work within the NHS which it is not your policy to fund.	£5,748	SG Westminster
11621 Farsophone Association in Britain	Funding mother tongue counselling and psychotherapy sessions which will reduce the mental distress of vulnerable refugees and migrants in London.	This application seeks funding towards an organisational coordinator to develop and ensure smooth running of services to replace funds which have expired. From the information provided it would appear that the grant requested would make the Trust the largest single funder which is not your policy.	£111,742	SD Barnet
11583 Harrow Carers	Supporting carers in Harrow, including those aged over 65, in improving psychological health and long-term mental health outcomes.	This project aims to reach carers of all ages with depression and other mental health needs. It is therefore insufficiently focused on your priority to tackle depression amongst older people aged over 65.	£82,641	JGC Harrow
11519 MAC-UK	To employ a Chief Operating Officer to help implement the radical transformation of mental health delivery for young people involved in gangs and anti-social behaviour.	Draft accounts to 30th September 2012 show free reserves of £220K against a policy to hold £102K. The organisation states it may use some of this surplus to increase the hours of existing posts etc when they could instead fund this request from the surplus if they thought it so important.	£140,921	CR Camden

Ref & Organisation	Purpose	Reason for Recommendation for Rejection	Amount Requested	Grants Officer & Area
11650 OK Foundation	Improved mental health of homeless people, through assessment, referrals and workshops in: healthy eating, cooking, well-being (craft and singing), IT and job search.	This request is a general package of support for local homeless people which does not sufficiently address mental health issues.	£19,110	SG Haringey
11646 Quaggy Development Trust	Secure Adults Secure Children - To reduce mental health issues of disadvantaged children in Greenwich/Lewisham through intensive support to families under stress or in crisis.	This application seeks funding for family support and ante-natal work with mothers under stress, which you have previously agreed fall outside your programme priorities.	£85,418	SG Lewisham
11384 Widows and Orphans International	To increase access to mental health services for 180 traumatised, vulnerable and isolated refugees and asylum seekers.	A very costly request for a project to address general trauma among refugees and asylum seekers. It is not fully clear how the work would meet the specific priorities of your mental health programme. The financial information provided does not make clear why this sum would be needed.	£190,582	JQM Barking & Dagenham
<i>Total Improving Londoners' Mental Health (8 items)</i>			<u>£660,162</u>	

<b>Ref &amp; Organisation</b>	<b>Purpose</b>	<b>Reason for Recommendation for Rejection</b>	<b>Amount Requested</b>	<b>Grants Officer &amp; Area</b>
<b><u>London's Environment</u></b>				
11587 People and Planet Student Activities Ltd	Engage, empower and support young Londoners from a variety of backgrounds in tertiary education to act as peer environmental educators and change makers.	Proposal is from an organisation based in Oxford and comprises- along with a hefty request for travel expenses - contribution to 6 core posts which is not your usual practice to support. Some of the outputs appear very low for the sum required.	£105,000	CR Outside London
<i>Total London's Environment (1 item)</i>			<u>£105,000</u>	
<b><u>Older Londoners</u></b>				
11603 Africa Advocacy Foundation (AAF)	Providing physical exercises, therapeutic massage, healthy living advice, IT skills, volunteering opportunities for African and Caribbean people aged 65 and above in Lambeth, Southwark, Lewisham	Conflicting information provided as to the age-group of the beneficiaries. Some of the outcomes appear over-optimistic. Free reserves held are considerably less than the policy level (19K held against a policy of £78K).	£98,621	CR Lewisham
11448 All Souls Clubhouse	Staff salaries for ClubCare, our project working with isolated older people in Fitzrovia, and the Cook's Salary for our weekly Lunch Club for older people.	The job description provided for the post to which you are asked to contribute includes a range of duties directly connected with the promotion of religion and is therefore ineligible to be considered for funding.	£19,830	JGC Westminster



Ref & Organisation	Purpose	Reason for Recommendation for Rejection	Amount Requested	Grants Officer & Area
11608 Brendoncare Foundation	Through improvements to residents' living spaces we will create a safe and stimulating dementia friendly environment, tailored to the needs of dementia sufferers to improve their quality of life.	This application seeks funding for improvements to a residential care setting, which it is not your policy to support.	£25,818	SG Outside London
11595 Harmony House Dagenham CIC	To support the work of Silvernet: a consultative and campaigning forum for Older people living in the borough of Barking and Dagenham.	Funding towards an existing programme. The applicant has not made a sufficient case that the work fits the outcomes of your programme for 'Older Londoners'.	£24,998	TW Barking & Dagenham
11580 Isle of Dogs Bangladeshi Association & Cultural Centre	Staff wages and running cost.	A small charity seeking funds for the salary of a part time worker to run Saturday groups for older people and which appears over costed. Returns to Charity Commission are consistently late which gives cause for concern.	£24,000	SD Tower Hamlets
<i>Total Older Londoners (5 items)</i>			<u>£193,267</u>	

#### **Positive Transitions to Independent Living**

11441 Bounce Back Foundation	Training, life skills and work experience project aimed at assisting ex-offenders with difficult transition of resettling in to their communities after such a custodial sentence.	The applicant body is a relatively new organisation and the information provided presents a confusing legal structure which would need to be resolved before a grant could be considered.	£80,216	JGC Lambeth
---------------------------------	--	---	---------	----------------

Ref & Organisation	Purpose	Reason for Recommendation for Rejection	Amount Requested	Grants Officer & Area
11634 Legal Advice Centre	To establish a project defining a new model of advice and advocacy provision for our users with mental health problems.	This is a general support service for people with mental ill health and does not address any of your specific criteria.	£84,000	SG Tower Hamlets
11597 Prison Fellowship England & Wales	To provide a restorative justice programme, called Sycamore Tree, in London prisons that will support offenders in making choices that reduce their risk of re-offending.	The organisation's recruitment practices, both for staff and volunteers, are overly restrictive and would not comply with the Trust's view of good practice.	£67,500	CR Westminster
11639 Right Step	Employment solution, IT Training workshops and skills acquisition to aid Employment, for people with jobless due to varies reason, disability, lack of the IT skills.	This request seeks funding for a general employment readiness project, which does not meet your criteria.	£20,410	SG Newham
11635 Soup Kitchen at the American Church	One year's salary for our Welcomer, who deals with referrals of our guests to other projects and guests' individual well-being.	The requested purpose of this application does not meet any of the criteria of your programmes.	£9,000	SG Camden
<i>Total Positive Transitions to Independent Living (5 items)</i>			£261,126	
<b>Grand Totals (29 items)</b>			<b>£1,600,721</b>	

# Agenda Item 8a

<b>Committee:</b>	<b>Date(s):</b>
The City Bridge Trust	18 April 2013
<b>Subject:</b> Withdrawn & Lapsed Applications (Working with Londoners programmes)	<b>Public</b>
<b>Report of:</b> Chief Grants Officer	<b>For Information</b>
<b><u>Summary</u></b>	
This Report draws your attention to those applications to the Working with Londoners which have been subsequently withdrawn by the applicant or lapsed due to additional information not forthcoming.	
<b>Recommendation</b>	
That you receive this report and note its contents	

## **Withdrawn Applications:**

### **Organisation**

### **Purpose of Request**

#### **TARA Arts Group Ltd**

"The renovation of existing premises to deliver an eco-sustainable theatre building that is fully accessible, and so achieve long-term business stability."

After discussion with your Officer the organisation has withdrawn this request to resolve some financial issues. It hopes to re-apply in due course.

#### **Shakespeare Globe Trust**

"Delivering a co-ordinated Access provision for audiences and performers in our new indoor Jacobean theatre and Access signage across the Globe site."

Organisation has withdrawn this request to reconsider the London benefit of any application to the Trust.

**Somali Bravanese  
Association In London  
(SBAIL)**

"English Classes (ESOL) For Refugees and Asylum seekers to improve their English language, build confidence, opportunity to socialize, integrate and become good citizens."

Organisation is now seeking advice on ESOL provision from borough lead and may re-apply at a later stage.

**Trussell Trust**

"Continued expansion of the London foodbank network so that every London borough has at least one community foodbank project. We have four boroughs to go."

Organisation wishes to withdraw this request and re-submit at a later date.

**Community Focus**

"To work with Young People 16-25 with recognisable mental health problems who have had/who are at risk of contact with the Criminal Justice System."

Following discussions with your Officer and developments to the proposed project, the organisation has decided to withdraw this application and re-submit a proposal that better meets your criteria.

**London Environmental  
Education Forum (LEEF)**

"Increase the value and effectiveness of Environmental Education so Londoners can act on environmental issues such as climate change and biodiversity conservation."

The application was submitted by the partnership organisation LEEF. As LEEF is not a legal entity in its own right, for clarity the application has been withdrawn and will be re-submitted in the name of its accountable body, London Wildlife Trust.

**Camden Arts Centre**

"To create a social group for older people in Camden to keep mentally and physically active by taking part in stimulating creative activities."

Application withdrawn when organisation was made aware that it could not be considered until 3 years had elapsed since the previous grant.

**Complicite**

"TEA - a unique community arts project for older people living in sheltered housing."

The organisation has advised that due to unforeseen circumstances the project cannot proceed at this time hence the application has been withdrawn.

**Kilburn Older Voices Exchange (KOVE)**

"Coordinator's role in project managing an initiative that focuses on isolated and lonely older people mainly aged 75 plus to heighten awareness in the community and to help link people to activities."

The organisation had misunderstood your rule over funding of repeat applications and applied before it was eligible. Following your Officer's advice, the organisation has withdrawn this application.

**Prison Advice and Care Trust**

"To fund the establishment and development of a London Women Ex-Offenders Resettlement Programme. This will help such women to make the transition to successful resettlement."

Application withdrawn when the organisation realised that it had applied too early following the end of the previous grant.

**CareNet**

"The grant will fund the contribution towards current part time coordinator post funded by Trust For London that will come to end march 2013."

Following your Officer's advice, the organisation has decided to withdraw this application and re-apply with a proposal that better meets your priorities.

**Total Withdrawn Applications: 11**  
**Total Lapsed Applications: 0**

**Recommendation**

That you receive this report and note its contents.

**Contact:**

Ciaran Rafferty, Principal Grants Officer

Tel: 020 7332 3186

Date report written: 03/04/13

<b>Committee(s):</b>	<b>Date(s):</b>
The City Bridge Trust	18 April 2013
<b>Subject:</b> Variations to Grants	<b>Public</b>
<b>Report of:</b> Chief Grants Officer	<b>For Information</b>
<b><u>Summary</u></b>	
<p>This report advises Members of variation to 9 grants agreed by the Chief Grants Officer since your last meeting.</p> <p><b>Recommendation</b></p> <p>That Members receive this report and note its contents.</p>	

## **Main Report**

Since your last meeting variations to the 9 grants outlined below have been agreed by the Chief Grants Officer, in line with the revised delegated procedure for the amendment of grants as agreed by your Committee in October 2004.

Although the number of variations at this meeting may appear high this is because of their being no meeting of the Committee in March to which some would otherwise have been reported.

### **Evaluation of Improving Services for Older People Programme**

In April 2008 a sum of £20,000 was agreed within the allocation for Strategic Initiatives to commission IVAR to evaluate the Improving Services for Older People programme. The final bill came in slightly less than the allocation and so the sum of £255 has been revoked.

### **Merton Mind**

In May 2008 you awarded the above £120,000 over 3 years for a project supporting older people with mental ill health. The project got off to a slow start in year 1 (due to staff changes and other factors) and never quite gained the momentum anticipated in year 2. Consequently it was agreed to revoke the third year's instalment of £40,000.

### **Lord Mayor's Show (2011)**

£23,500 was set aside in May 2011 (within your allocation for Strategic Initiatives) to cover the costs of the Trust's participation in the 2011 Lord Mayor's Show. After settling all invoices the unused sum of £286 was revoked.

### **Lord Mayor's Show (2012)**

In May 2012 £24,110 was agreed from the allocation for Strategic Initiatives towards the Trust's participation in the 2012 Lord Mayor's Show. After the settling of all invoices the unspent balance of £4,160 was revoked.

### **Wandsworth Women's Aid**

In March 2009 a grant of £23,000 was approved for three years' support of art and dramatherapy sessions with children. Although the organisation satisfactorily reported on the first year (ending December 2010) no report was received for the second year nor has the third year's instalment (£7,900) ever been claimed. This sum has therefore been revoked.

### **Grandparents' Association**

The above was awarded £77,500 in May 2009 for a three year project which included an element of £2,500 for evaluation. Despite much advice and guidance being given to the organisation throughout the lifetime of the project no independent evaluation was commissioned (although the standard reporting of the grant was satisfactory throughout). As a result the £2,500 sum has been revoked.

### **St Paul's Cathedral Foundation**

St Paul's Cathedral Foundation was granted £1,184,045 in July 2004 towards the creation of an education centre and other access works. The grant has been paid out in a series of instalments since then and until February 2011 when the last payment was claimed. All but £1,514 has been claimed and, given the time since the works have been completed, it has been assumed that this balance is no longer required and has been revoked.

### **St Paul's Church Hainault**

In March 2012 the above was awarded £42,600 for access works. The organisation wrote to the Trust in October 2012 to inform us that, in the economic climate, they felt they were no longer able to raise the full target of £1.5m and that the grant was no longer required. This sum has therefore been revoked.

### **Bromley Bowling Club Ltd**

In July 2011 £18,300 was awarded to provide disabled access and facilities for bowlers, visitors and guests. The new facilities, which were



opened by your Chairman in 2012, came in slightly under-budget and so the unspent balance of £432 has been revoked.

**Contact:**

Ciaran Rafferty

Tel: 020 7332 3186

Date report written: 03/04/2013

This page is intentionally left blank

<b>Committee:</b>	<b>Date(s):</b>
The City Bridge Trust	18 April 2013
<b>Subject:</b>	<b>Public</b>
Grants Approved under Delegated Authority	
<b>Report of:</b>	<b>For Information</b>
Chief Grants Officer	
<p><b><u>Summary</u></b></p> <p>This Report draws your attention to 5 applications which have been approved under delegated authority either by the Chairman and Deputy Chairman or by the Chief Grants Officer.</p> <p><b>Recommendation</b></p> <p>That you receive this report and note its contents</p>	

## **By the Chairman and Deputy Chairman**

### **Organisation**

### **Amount and Purpose of Grant**

#### **Angel Shed Theatre Company**

£24,000 over three years (3 x £8,000) towards the salary of a part time Community Outreach and Inclusive Support Worker (16hrs p.w) and 1 day p.w of the Artistic Director's salary.

#### **Westminster House Youth Club**

£18,200 for a third and final year's support towards the salary of a full-time youth worker, subject to receipt of a satisfactory report for year two of the current grant award.

#### **Fanshen**

£6,500 towards its performance of Green and Pleasant Land and workshops in 10 primary schools and 4 open spaces in 2013.

#### **Garden Classroom**

£25,000 towards the salary and on costs of the Chief Executive to consolidate and deliver an environmental programme in North East London.

**Action for Advocacy**

£24,000 for one year's support of a part-time post plus associated costs of a project to map and develop BME information, advice and advocacy providers in London.

**Recommendation**

That you receive this report and note its contents.

**Contact:**

Ciaran Rafferty, Principal Grants Officer

Tel: 020 7332 3186

Date report written: 03/04/13

## City Bridge Trust – Monitoring Visit Report

<b>Organisation:</b> Pesticide Action Network UK	<b>Grant ref:</b> 9744 (Ciaran Rafferty)	<b>Programme area:</b> London's Environment
<b>Amount, date and purpose of grant:</b> 18/02/2010: £52,500 over three years (£17,000; £17,500; £18,000) for the salary costs of a part-time Volunteer Co-ordinator to support London volunteers, work with parks managers who want assistance with reducing the use of pesticides. The grant in years 2 and 3 conditional upon the balance of funds being raised from other sources.		
<b>Visiting Grants Officer:</b> Tim Wilson accompanied by Alderman Alison Gowman		<b>Date of meeting:</b> 25 March 2013
<b>Met with:</b> Keith Tyrell (Director) and Nick Mole (Policy Officer and Volunteer Coordinator)		
<p><b>1. Introduction to the organisation:</b> Pesticide Action Network (PAN) works to promote alternatives to chemical pest control, to reduce pesticide dependence, and to eliminate the use of pesticides that are environmentally harmful. Established in 1982, PAN is part of a global network of 600 organisations working towards similar aims. In the UK, PAN publishes guidance for decision-makers and other interested parties on the use of pesticides and promotes policy change.</p> <p>PAN's work with global partners includes supporting farmers to move towards organic methods, encouraging better labelling by supermarkets and certification bodies, and monitoring the impact of pesticides on health.</p> <p>The charity has a small staff team and has weathered some difficult times recently, with three grants accounting for over 70% of its income ending in the same year. However, and following a review of activities, PAN concentrates on work that it believes is likely to be most influential, and actively seeks partners who can help disseminate their messages to a wider audience.</p>		
<p><b>2. The project funded:</b></p> <p>Whilst 95% of pesticide use in the UK is agricultural, the majority of human pesticide exposure comes from their use in parks and other urban green spaces. In 2009 the EU Directive on the Sustainable Use of Pesticides included provision to restrict their use in public parks. PAN identified this directive as an opportunity to focus on the use of pesticides in London's green spaces.</p> <p>City Bridge Trust awarded a three year grant of £52,000 in February 2010. PAN drew down first instalment in January 2011, and funds are provided towards 2.5 days per week of the pesticide-free parks project Volunteer Coordinator, working with a network of volunteers towards the aim of pesticide-free green spaces. The second and third years of the award were conditional on PAN raising other funding, which it did from the Chapman Trust.</p> <p>The original post-holder left PAN in March 2011, and the work has been delivered by Nick Mole (who is also the charity's Policy Officer) since then.</p>		
<p><b>3. Work delivered to date:</b></p> <p>In the first year of grant, the majority of work went into developing materials for volunteers to use when campaigning for pesticide-free local green spaces. PAN identified and contacted over 600 friends of parks groups across London, working to engage them with the campaign. PAN took advantage of growing interest in bee-keeping and bee numbers to highlight the importance of biodiverse green spaces in urban areas in order to promote pesticide-free parks. PAN found it harder to engage</p>		

with parks managers, as these people were often dealing with reduced budgets and time to discuss new projects. The charity sought to remedy this by creating an online resource for park managers to advertise their needs, and volunteers to identify their willingness to provide support.

In the second year of grant the website for parks managers and the public was made live, and the toolkit made available for download. The post-holder built relationships with several larger partners including Sustain and Friends of the Earth in order to push for measures outlawing pesticide use in urban spaces. The charity was invited to give evidence to the Environment Audit Committee in 2012, and was able to make good progress with two London boroughs interested in rolling out a pesticide-free approach to their parks management.

#### **4. Difference made:**

Whilst the first year of work was preparatory, the relationships PAN built and the materials it developed started to generate change in the second year of grant. PAN has been able to foster particularly good contacts four London Boroughs and hopes that one will shortly declare itself pesticide free. PAN hopes this will provide impetus for others to do likewise.

The charity has enjoyed much greater interest in its work than originally expected because of the widespread media coverage of bee-keeping. PAN has used this well, and tailored its materials to connect its pesticide work to relevant bee issues.

The website has been developed to allow groups to post their own materials, and PAN has designed it to be self-sustaining if no further funding is secured. It is worth noting that the work has been delivered during an especially turbulent financial time for PAN.

#### **5. Grants Administration:**

Accounts for the year ending 31<sup>st</sup> December 2011 correctly identify City Bridge Trust funding. 2012 accounts are not yet available. The first monitoring report was submitted in December 2011 and rated "satisfactory" as the project had made a slower than expected start, reflecting the difficulties experienced by PAN in that year. The second monitoring report was submitted in October 2012 and showed improvement, being rated "good". The Grant Officer noted that work was progressing well and enjoyed good levels of engagement. A final report is expected in October 2013.

During the visit PAN shared a copy of the financial records kept for the project which show the way funds are tracked for staff time and appears satisfactory. A form P11 had been requested in advance but was not supplied during the meeting. It is expected to follow shortly by email and will be placed on file.

#### **6. Concluding comments:**

PAN is a small organisation, but clearly well respected for its reasoned, scientific approach to pesticide use. It appears counter-intuitive that PAN might focus efforts on pesticide use in urban areas when the majority of pesticide use is rural. However, the charity has identified a way of engaging the broader public by focusing on parks and green spaces which is where there is most human contact with pesticide.

The first year of work focused on materials and contacts, but there is evidence that, through thoughtful partnership working, the charity has reached a much larger audience than it would otherwise have been able to by itself.

It may be challenging for PAN to sustain an active website after this grant unless replacement funding is secured. Although the URL has been registered for the future, public participation on the website may wane without a central coordinator.

## City Bridge Trust – Monitoring Visit Report

<b>Organisation:</b> Fine Cell Work	<b>Grant ref:</b> 10304	<b>Programme area:</b> Improving Londoners' Mental Health\ d) Prisoners, ex-prisoners & other in the Criminal Justice System
<b>Amount, date and purpose of grant:</b> 20/01/2011: £98,500 (£27,400, £29,500, £41,600) over 3 years towards the salary costs of a Studio Workshop Manager at H.M.P Wandsworth helping improve social and employability skills on release.		
<b>Visiting Grants Officer:</b> Jenny Field accompanied by Deputy Nash	<b>Date of meeting:</b> 5 <sup>th</sup> February 2013	
<b>Met with:</b> Katy Emck (CEO), Hilda Sheppard (Studio Workshop Manager) + several volunteers.		
<p><b>1. Introduction to the organisation:</b>                  Established in 1997, Fine Cell Work (FCW) uses trained volunteers to teach needlework to serving prisoners – 75% of them men. Despite the preconception that needlework is for women only and the 'macho' image of most male prisoners, the classes are very popular, always with a waiting list. The quality of the cushions, bags, wall hangings and quilts produced is very high and much of the work is commissioned. Prisoners also produce heritage commissions for such institutions as the V&amp;A, Tate Modern, English Heritage and the National Gallery. Participating prisoners are able to earn a salary from sales of goods produced which is then saved and kept for their release.</p>		
<p><b>2. The project funded:</b>                  The Trust's grant is towards the salary of the Studio Manager at HMP Wandsworth. The post was established to help expand the classes and increase the number of prisoners able to participate. We visited when a class was underway and we were able to talk freely to the volunteers and prisoners. The prisoners are able to continue their needlework during the long hours they spend in their cells.</p>		
<p><b>3. Work delivered to date:</b>                  The project funded by Trust is approaching the end of its second year. During the first year, it worked with prisoners from the Vulnerable Prisoner Unit. A change in policy whereby these prisoners were re-located to different prisons around the country during the year, meant that the increased number of prisoners worked with at the beginning of the year, dipped towards the end of the year. During year 2, FCW has been working with prisoners from the main wing and the numbers have increased again during the year.</p>		
<p><b>4. Difference made:</b>                  The prisoners we spoke to were very enthusiastic about the project. None of them had stitched before starting the classes. The quality of their work was most</p>		

impressive. They clearly felt a great sense of pride and achievement. A couple of them talked about the calming effect of stitching and how needlework provided them with something useful to do when in their cells. One of them was working on a piece commissioned by the Trust - a wall hanging with an embroidered City of London Corporation crest.

During 2011, FCW commissioned an independent evaluation of 22 of the prisoners with whom it had worked, including 5 from Wandsworth Prison. Those interviewed reported increased self-esteem and a greater sense of self-worth, whilst those with mental health problems spoke of the therapeutic and calming benefits.

As well as teaching the prisoners with the technical skills to stitch, involvement in the project also teaches them 'soft' skills such as teamwork, co-operation and perseverance – all useful and transferrable in the workplace. In the longer term, FCW plans to build links with external employers and help those prisoners nearing the end of their sentence into paid employment upon their release.

#### **5. Grants Administration:**

The Trust's grant is clearly shown as a restricted fund in FCW's audited accounts for the year ending 31st December 2011. December 2012 accounts will be available in the summer of this year.

The first year's monitoring report was of a good standard with the information clearly presented. FCW were asked to provide more feedback from the prisoners about how they perceived the difference the project had made to them in their next report which is due in March 2013.

#### **6. Concluding comments:**

FCW is an impressive organisation, employing inspirational staff and volunteers. The work produced by serving prisoners is of a very high standard and attracts a wide range of commissions. Participation in the project connects prisoners to wider society whilst teaching them valuable skills. It also enables them to support their families with the money they earn.



# Agenda Item 9

<b>Committee:</b>	<b>Date:</b>
City Bridge Trust Committee	18 April 2013
<b>Subject:</b> Expansion of City Careers Open House programme	<b>Public</b>
<b>Report of:</b> Chief Grants Officer Director of Economic Development	<b>For Decision</b>
<b>Summary</b> <ol style="list-style-type: none"><li>1. Raising aspirations of young people is a central element of the City Corporation's work to support communities in neighbouring boroughs. A key part of that work is the City Careers Open House programme which brings around 1,000 young people into the City each year, facilitating taster visits to City businesses to demystify the world of work and raise awareness, in a practical context, of routes into employment.</li><li>2. In response to initial discussions at the Resource Allocation Sub-Committee Away Day in July 2012, and input from third parties confirming the value of this activity to local communities, the Economic Development Office is exploring ways of expanding City Careers Open House.</li><li>3. This expansion would involve providing capacity to extend the reach of the programme from the current 26 secondary schools per year (950 students) to all 88 schools in the seven neighbouring boroughs (2,640 students) in each of the academic years 2013/14 and 2014/15.</li><li>4. Over the same time period, the expansion would allow the pilot primary school element to extend from the current 13 schools per year to 91 per year (of the total of around 350 in the seven neighbouring boroughs).</li><li>5. The delivery body for both elements would be The Brokerage Citylink, a registered charity.</li><li>6. The costs of the proposed expansion would be £267,900 with a suggested budget of £12,100 to cover materials, other related costs and a contingency, this gives a grand total of £280,000.</li></ol>	
<b>Recommendation</b> <p>That you approve a grant of £280,000 for the costs of expanding the City Careers Open House programme subject to a satisfactory financial assessment of the grant recipient by the Chamberlain. The grant is conditional on the Policy &amp; Resources Committee approving this approach and agreeing to an uplift of £280,000 to the City Bridge Trust grants budget for 2013/14, to be met from the revenue surplus in Bridge House Estates.</p>	

## **Main Report**

### **Background**

1. The City Careers Open House programme provides aspiration-raising half-day taster visits to City businesses for groups of school students within the City's neighbouring boroughs. It is delivered on the City Corporation's behalf by third party organisations and forms a key part of work to support communities across wider London.
2. Since its inception in 2006, the programme has introduced 6,500+ young people (years 8-10 i.e. 12-14 year olds) in secondary schools in neighbouring boroughs to the world of work, working with 50 schools, and arranging visits to some 30 businesses. In addition to this and in response to demand, a pilot component of the programme has recently focused successfully on young people in the final year of primary school (and parents).
3. The programme is a practical example of facilitating meaningful employer contacts for young people at a pivotal point in their education. It responds to the increasing body of evidence suggesting a positive relationship between the number of employer contacts that a young person experiences during their school career and their confidence (at 19-24) in progression towards ultimate career goals, the likelihood of whether (at 19-24) they are NEET<sup>1</sup> or non-NEET and future earnings<sup>2</sup>.

### **Current Position**

4. The City Corporation wishes to enhance its efforts to support wider London. This proposal complements the employability initiative to be delivered through Central London Forward; the 'Youth Offer' grants to all London boroughs to help 'NEET's into work; and the £1m Growing Localities horticultural work-training programme. There is scope to boost City Careers Open House, led by the Economic Development Office, to raise aspirations among young people in the seven immediately neighbouring boroughs and, in time, to open up the City to diverse new talent.
5. City Careers Open House could lend itself well to increased volumes, not least as there is clear unmet demand from schools. The main limiting factor would be the number of City businesses prepared to host visits.
6. This work is widely considered by third parties as a fundamental part of the City Corporation's support for its neighbouring communities. Indeed, the

---

<sup>1</sup> NEET = Not in Education, Employment or Training.

<sup>2</sup> *It's who you meet: why employer contacts at school make a difference to the employment prospects of young adults*, Education and Employers Taskforce, June 2012.

Mayor of Hackney, for example, has stated that one of the single most important offers the City Corporation could make to Hackney would be to provide an insight into City businesses for more local young people including at younger age groups.

7. The project, currently mid-way through an existing contract, which started in April 2012 and is funded by 'Section 106' planning gain monies, is delivered through third party organisations. Both contracts run for the remainder of the 2012/13 academic year and for the full 2013/14 academic year.
8. This report sets out costs associated with scaling up the programme substantially, in the first instance in the academic year 2013/14, supplementing the current contracts, which will run to completion. It also outlines the total costs for running the programme at this enhanced scale for the academic year 2014/15, beyond the end of the current contracts. It is proposed that the Brokerage Citylink, a registered charity and current delivery body for the secondary school programme, delivers the enhanced element of both the primary and secondary school parts of the programme.
9. The report proposes that these costs be met by way of an uplift to the City Bridge Trust grants budget to be met from the revenue surplus in Bridge House Estates. This would be additional to the City Bridge Trust's grants budgets for 2013/14 and the approval of the Policy & Resources Committee will be sought. Existing 'Section 106' monies are already earmarked to continue levels of activity in existing programmes. From April 2014 there is also some uncertainty, in view of changes to the planning gain regime, around the availability of such funds and the City Corporation's freedom to allocate them. The proposal to scale up the City Careers Open House programme by way of an uplift to the City Bridge Trust grants budget responds to the City Corporation's wish to *increase* its support to London's communities beyond levels permitted by existing budgets.

## Proposals

10. With additional funding of £280,000, both elements of City Careers Open House could be enhanced substantially in the 2013/14 academic year and sustained in 2014/15.
  - a. *Secondary schools*: **ALL** 88 secondary schools in the City's seven neighbouring boroughs would be offered a visit, potentially increasing the number of young people taking part from the planned 960<sup>3</sup> in 2013/14 to 2,640<sup>4</sup>.

---

<sup>3</sup> 26 visits with an average of 37 students per visit = 962 students.

<sup>4</sup> 88 visits with an average of 30 students per visit, the lower number per visit taking account of likely space constraints within City businesses' premises.

- b. *Primary schools*: A total of 70 primary schools in neighbouring boroughs (more than a fifth of the total of 347) to take part (10 per borough), an increase of 57 from the current 13 planned visits in the 2013/14 element of the pilot, potentially increasing the number of young people taking part in that period from 195<sup>5</sup> to 1,400<sup>6</sup>.

## Costings

<b>2013/2014</b>	<b>£</b>
Secondary schools (additional 62 visits at £967 each)	60,000
Primary schools (additional 57 visits at £780 per visit)	44,500
<b>2014/2015</b>	
Secondary schools (additional 88 visits at £967 each)	85,100
Primary schools (additional 70 visits at £780 each)	54,600
<b>General</b>	
Set-up costs covering e.g. staff time to build and expand relationships with schools and City businesses.	23,700
Materials/Contingency (for any unforeseen but relevant additional costs above and beyond running of the visits e.g. transport, learning resources, evaluation support)	12,100
<b>TOTAL</b>	<b>£280,000</b>

11. The Brokerage Citylink, the delivery organisation, is satisfied that the increased level of activity outlined above is achievable, both in terms of the in-kind support required by City businesses and the input required from schools to allow young people to benefit from the programme in increased numbers.
12. The Brokerage Citylink was appointed to deliver the secondary school element of the current City Careers Open House contract following a rigorous competitive tender exercise, assessing price and quality of the services.

## Corporate & Strategic Implications

13. This proposal meets Government and Mayoral priorities and supports:
- the Community Strategy themes: “is competitive and promotes opportunity”; “supports our communities” and “is safer and stronger”.
  - the Corporate Plan objective of providing “valued services to London and the nation”, and key policy priority to “be a good neighbour”.
  - priorities within the business plans of the City Bridge Trust and the Economic Development Office.

<sup>5</sup> 13 visits with an average of 15 students.

<sup>6</sup> 70 visits with an average of 20 students.

14. An equalities impact assessment has been undertaken concluding that the proposed sponsorship would not have an adverse impact on equalities.

### **Implications**

15. The Comptroller and City Solicitor has advised that grants for charitable purposes associated with addressing employability made to organisations which meet the criteria for funding by City Bridge Trust may be regarded as within the Guidelines and the purposes of the Charitable Scheme.

### **Conclusion**

16. The proposed expansion of the City Careers Open House programme is a powerful way of raising the aspirations of substantial numbers of young people in London. It builds on an existing example of good practice and, through demystifying the City and employment opportunities available for local young people, could make a valuable contribution to their longer term employability.

**Clare Thomas**

**Chief Grants Officer**

T: 020 7332 3713

E: [clare.thomas@cityoflondon.gov.uk](mailto:clare.thomas@cityoflondon.gov.uk)

This page is intentionally left blank

<b>Committee(s):</b>	<b>Date(s):</b>
The City Bridge Trust	18 April 2013
<b>Subject:</b> City Bridge Trust Business Plan 2013-16	<b>Public</b>
<b>Report of:</b> Chief Grants Officer	<b>For Decision</b>
<p><b><u>Summary</u></b></p> <p>This report introduces the new City Bridge Trust business plan.</p> <p><b><u>Recommendation</u></b></p> <p>That Members approve the Business Plan 2013-16 as circulated.</p>	

## **Main Report**

The City Bridge Trust Business Plan 2013-16 has been circulated to Members as a separate document from your main bundle of papers.

The format of the report is very similar to those you have approved in past years and contains all of the City of London Corporation required elements. The plan includes both headline information and detailed workplans, incorporating the Trust's eight key performance indicators. In particular this year the plan highlights the work on corporate philanthropy and social investment strategies both of which are developing an increasing profile within the Trust's overall portfolio of work.

It has been observed in the past that the CBT business plan is a longer document than is produced by some other parts of the City Corporation. However it has proved helpful in briefing new staff, grants committee members and others to use the business plan as a single point of information about the Trust, including a longer narrative about the way that the Trust works.

### **Recommendation**

**That Members approve the Business Plan 2013-16 as circulated.**

#### **Contact:**

Clare Thomas, Chief Grants Officer  
 020 7332 3713 [clare.thomas@cityoflondon.gov.uk](mailto:clare.thomas@cityoflondon.gov.uk)  
 Report written: 26/03/2013

This page is intentionally left blank



# Agenda Item 14

By virtue of paragraph(s) 3 of Part 1 of Schedule 12A  
of the Local Government Act 1972.

Document is Restricted

This page is intentionally left blank

# Agenda Item 15

By virtue of paragraph(s) 3 of Part 1 of Schedule 12A  
of the Local Government Act 1972.

Document is Restricted

This page is intentionally left blank